

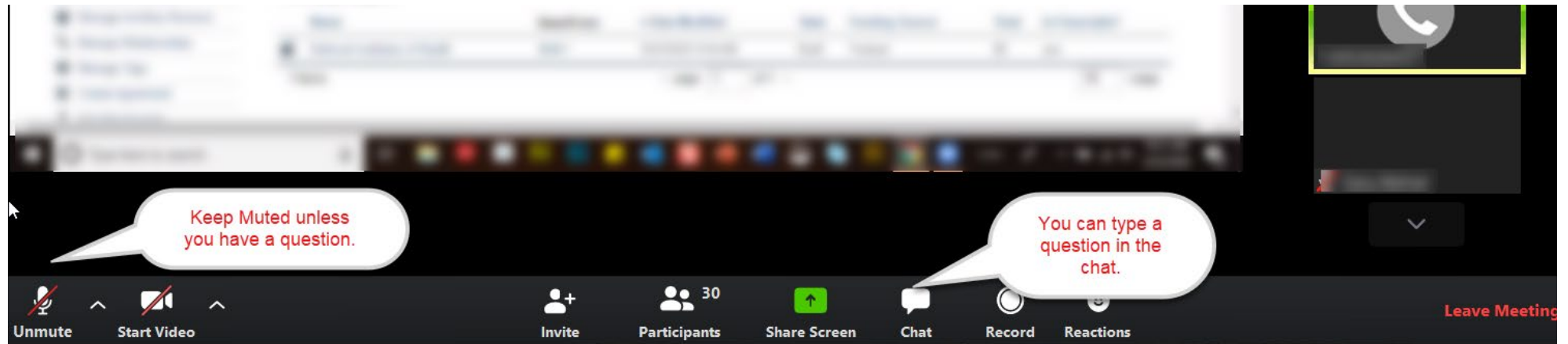
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IBISResearch: Navigating the System for PIs

**Maria Valero-Martinez
Manager, Research Training
Office of Research Administration**

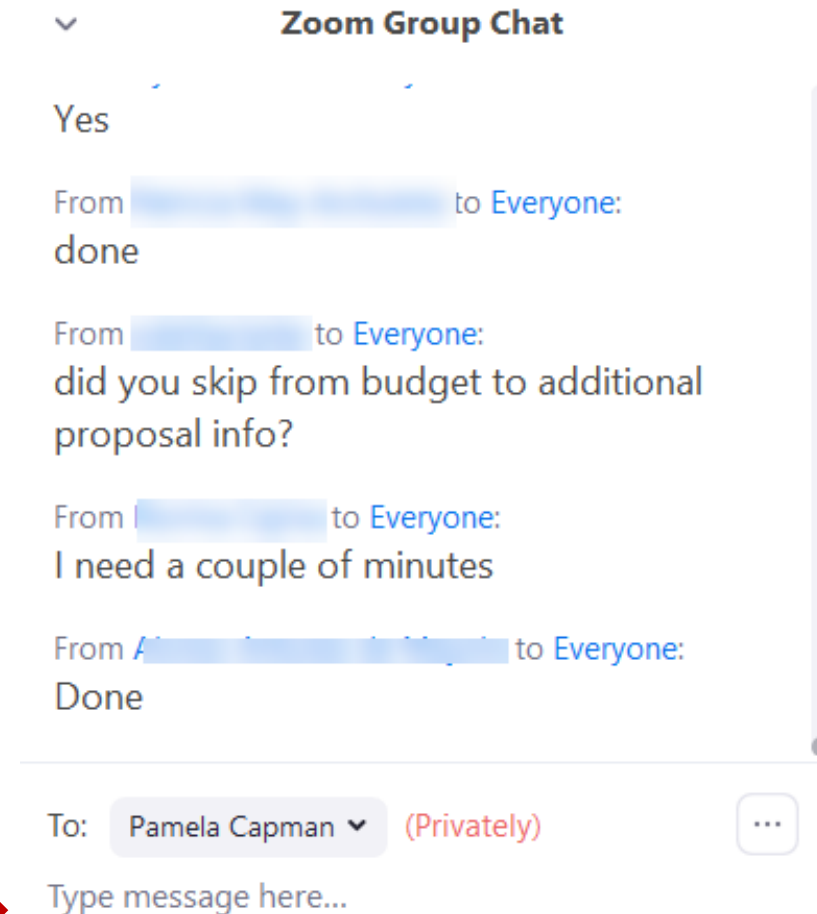
Zoom Features



Zoom Chat

You can use the Zoom Chat Box

- Type in the message
- Send it to *Everyone*
- Send it to someone *Privately*



Zoom Group Chat

Yes

From [redacted] to Everyone:
done

From [redacted] to Everyone:
did you skip from budget to additional
proposal info?

From [redacted] to Everyone:
I need a couple of minutes

From [redacted] to Everyone:
Done

To: Pamela Capman (Privately) [more options]

Type message here...



Agenda

- Navigate the System
- Submit Proposal
- Upload PDF Documents in Research Plan
- Create a Funding Proposal
- Navigate to SF424
- View History, Reviewer Tabs
- Respond to Change Requests
- Track Proposal
- Notify SPO of Grant Status
- Create an Agreement

Learning Objectives

After this session you will be able to...

- Demonstrate new terminology and navigation of IBISResearch
- Demonstrate how to upload and review the Research Plan
- Explain how to track proposals, awards, agreements and amendments in IBISResearch



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

Creating and Submitting Proposals

All Funding Proposals will be created

IBISResearch

Creating and Submitting Proposals

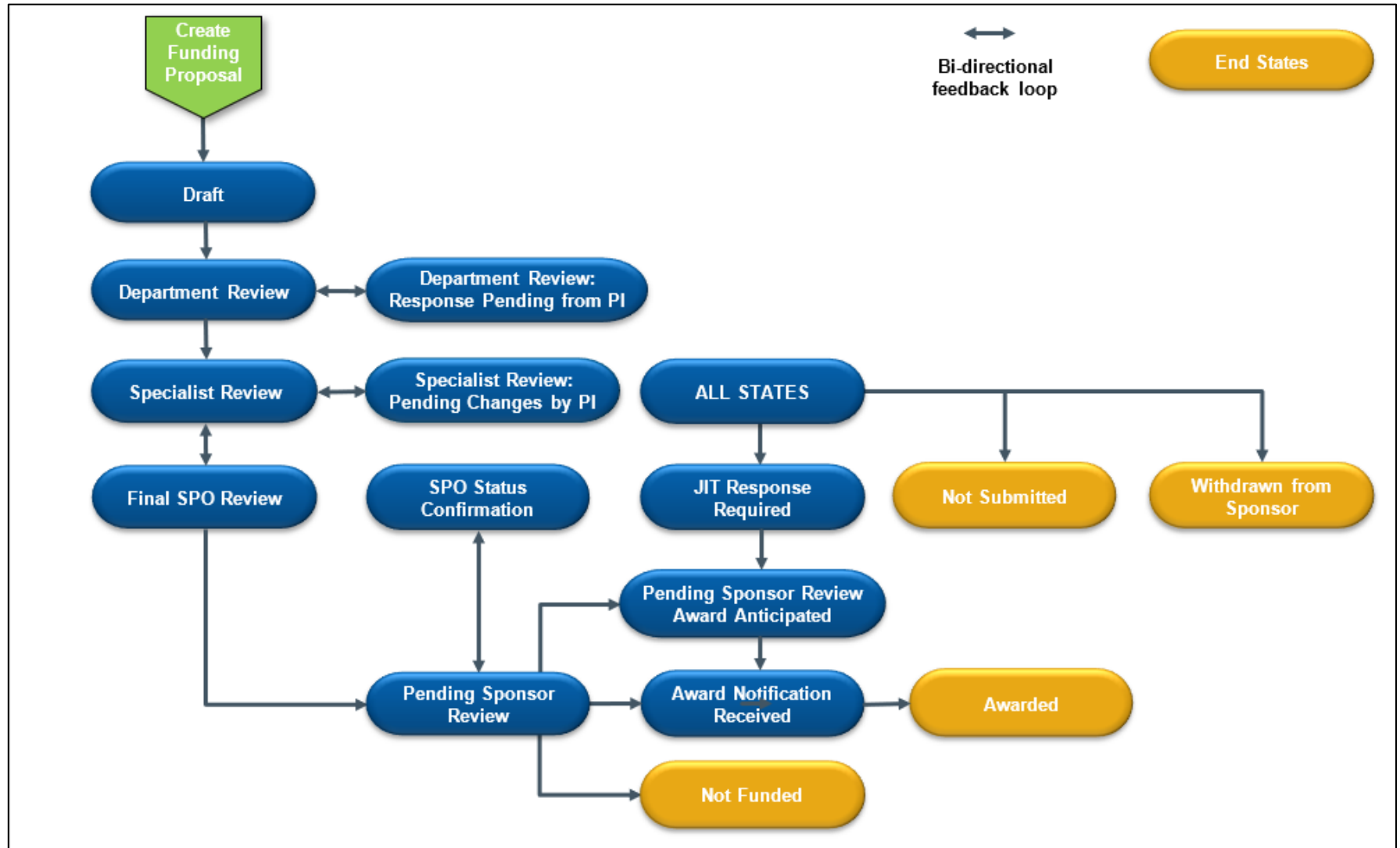
- *Federal Funding Proposals* that go through Grants.gov will be *submitted electronically to the sponsor through IBISResearch*
 - **Exceptions:** Program Projects and Center Grants
- Program Projects, Center Grants and Non-Federal Funding Proposals will be created in IBISResearch. Once approved by department and ORA, you will submit those proposals through Assist, NSPIRES, or other sponsor systems

IBISResearch

Submission Types

- **The proposal smartform can be used to support the following submissions:**
 - Grants.gov
 - Foundation
 - Incoming Subawards
 - Industry
 - State
 - Clinical Trial

Proposal Workflow



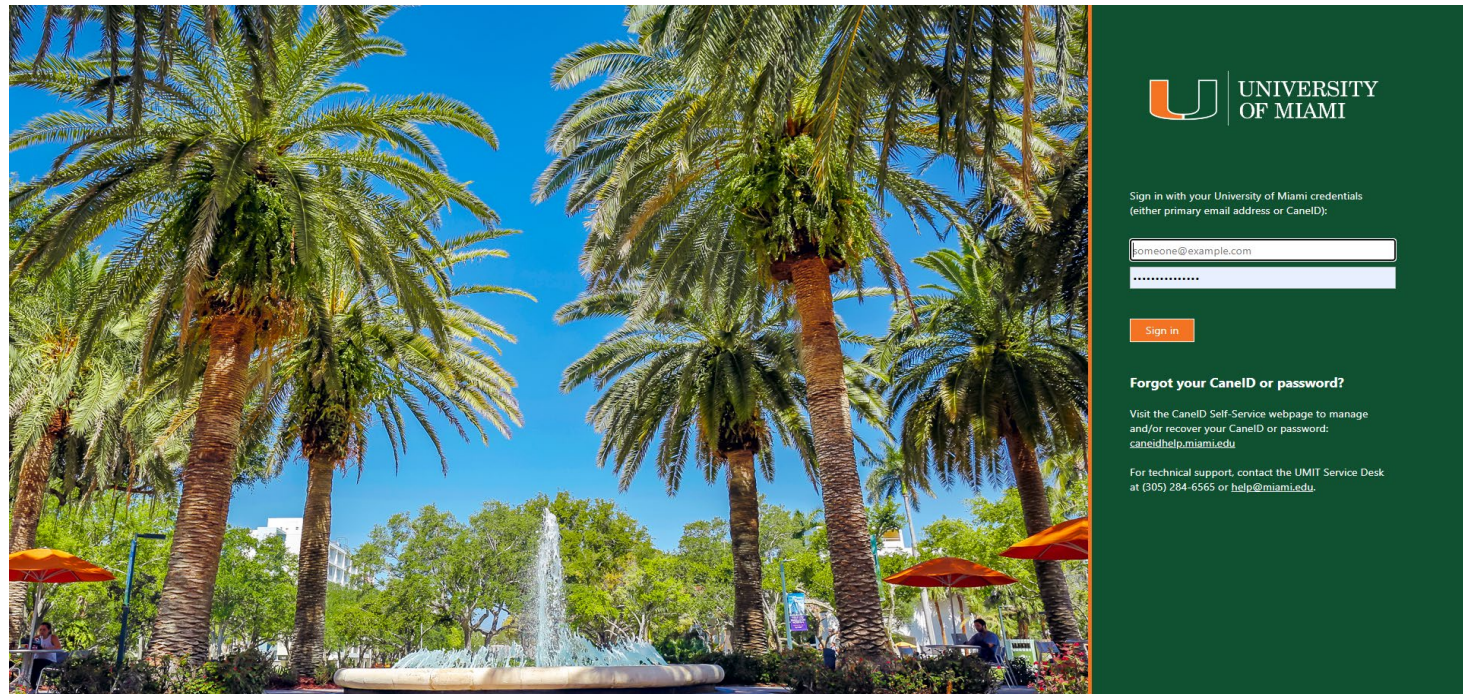
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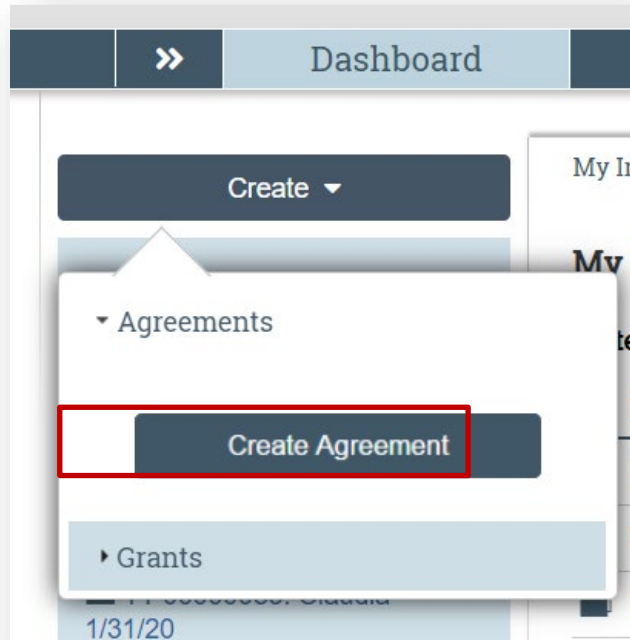
Get Started

Signing In

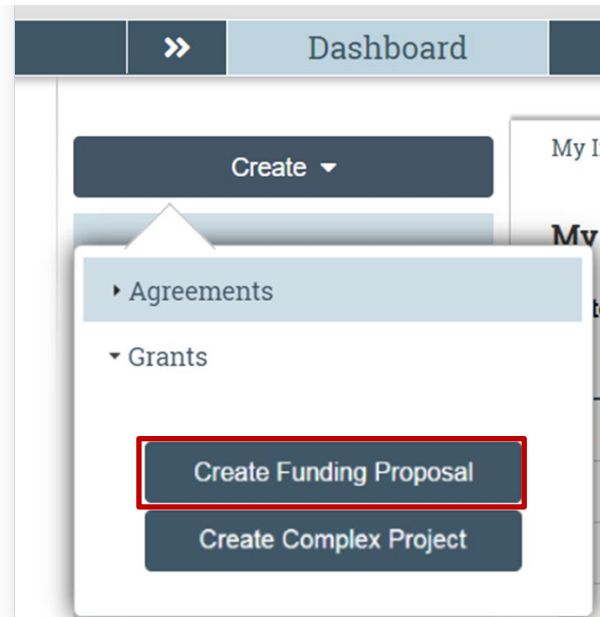
- The IBISResearch system can be accessed from the ORA website www.ora.Miami.edu
- Click on the IBISResearch link
- Sign using your University of Miami Credentials



Creating Agreements and Funding Proposals



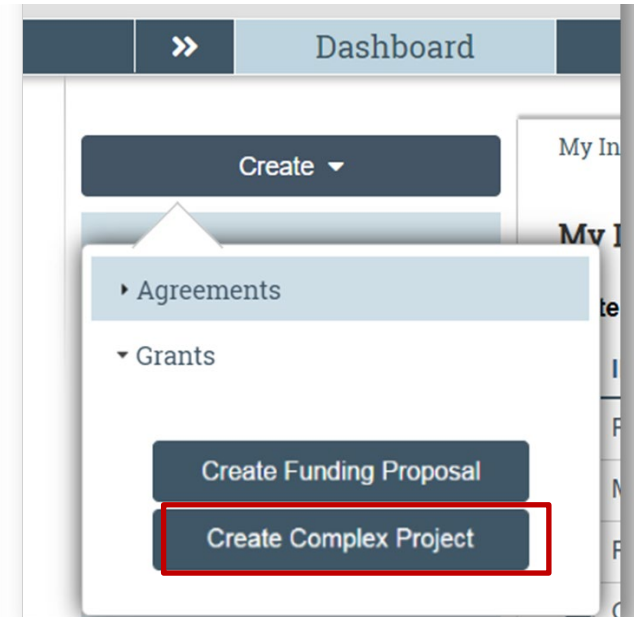
Create Agreement



Create Funding Proposal



THIS IS A NEW PROPOSAL



The University of Miami **does not** use the **Complex Projects** page

Manage Your Guest List

- Submit For Department Review
- Withdraw Proposal
- Manage Ancillary Reviews
- Create-Update SF424
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email
- Manage Guest List**
- Add Comment

Proposal team editors:

Last	First	Organization
Brown	Mary	Gastroenterology
Brown		

First Name

Mary

Proposal team readers:

Cook

First Name

Mark

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Submit for Department Review

Submit for Department Review

Draft

FP00000276

Funding Proposal

Next Steps

Edit Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

Submit For Department Review

Withdraw Proposal

Manage Ancillary Reviews

Create-Update SF424

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Create Additional Budget

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health (NIH)
Internal Submission Deadline:	6/2/2020
SF424 Link:	

Budget Information

Starting Date:	1/1/2021
Number of Periods:	2
Total Direct:	\$470,000
Total Indirect:	\$222,025
Total:	\$692,025

Budgets

SF424 Summary

History

Reviewers

Attachments

Financials

Reviewer Notes

Related Projects

...

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Institutes of Health (NIH)	[Edit]	3/23/2020 3:24 PM	Draft	Federal	\$692,025	yes
Cost Sharing for National Institutes of Health (NIH)	[Edit]	3/23/2020 3:24 PM	Draft	Institution (Internal)	\$20,000	no

2 items

page 1 of 1

10 / page

Submit for Department Review


If the proposal team submits on behalf of the PI, they must print this endorsement, obtain signature from the PI and attach it to the Funding Proposal.

Endorsements

I will abide by applicable sponsor and Institution regulations in the conduct of the program, including provision of timely reporting per terms of the award. For multi-year awards with automatic renewals (no interim progress reporting required), this form will serve the term of the award.

PRINCIPAL INVESTIGATOR/PROGRAM DIRECTOR ASSURANCE: I certify that the statements herein are true, complete and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of this application.

One of the following options must be selected:

1. As PI/PD for this submission, I approve the above endorsements: 
2. As a member of this proposal team, I will obtain the PI/PD's signature for the endorsements:

3

OK

Cancel

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SF424 Research Plan

Update SF424 Research Plan

Specialist Review

3/11/20_Pilot_Proposal

FP00000033

Funding Proposal

Next Steps

View Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

Manage Ancillary Reviews

Update SF424 Research Plan

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Copy

Proposal Information

PD/PI: Rebecca Simms (pi)
Department: Gastroenterology
Specialist: K. Brandon Strickland
Sponsors: National Institutes of Health (NIH)
Internal Submission Deadline: 6/2/2020
SF424 Link: SF-4240000149 2

Budget Information

Starting Date: 7/1/2020
Number of Periods: 5
Total Direct: \$1,008,943
Total Indirect: \$248,586
Total: \$1,257,529

Budgets SF424 Summary History Reviewers Attachments Financials Reviewer Notes ...

Working Budgets

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Institutes of Health (NIH)	[Edit]	3/10/2020 2:40 PM	Under Review	Federal	\$1,257,529	yes

1 items

page 1 of 1

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1. Use the Activity: Update SF424 Research Plan

Update SF424 Research Plan

SF424 Research Plan Attachments

- 1. Introduction of application:**
[None]
- 2. Specific aims:**
[None]
- 3. Background and significance:**
[None]
- 4. Research strategy:**
[None]
- 5. Inclusion enrollment report:**
[None]
- 6. Progress report publication list:**
[None]
- 7. Project summary / abstract:**
[None]

You cannot see what is already uploaded from here.

2. Edit SF424 Application

Pre-Submission

Edit Grant Application

Printer Version

[Validate Submission](#)

[Generate PDF Version](#)

[Assign Editors and Readers](#)

[Log Comment](#)

[Import Subaward](#)

3/11/19_Pilot_Proposal

SF-42400000149 SF424

Descriptive Title:	3/11/19_Pilot_Proposal	Start Date:	7/1/2020
Submission Type:	New	End Date:	6/30/2025
PDF Version(s):	Not Available, Please execute Generate PDF Version activity		
Agency			
Tracking Number:			
Grant			
Tracking Number:			
Received Date/Time:			
Status Updated:			
Principal Investigator:	Simms (pi), Rebecca	FOA:	PKG00037268/PA-EI-R01(FOA00000014)
Authorized Representative:	Authorized Organization Representative, Test	Date Modified:	3/10/2020 2:26 PM
Contact Person:	Lambert, Ava		

Track Proposal

Federal Funding Agency
Tracking Number Assigned

[View Grant Application](#)

[Printer Version](#)

[Get Status Detail](#)

[Generate PDF Version](#)

[Assign Editors and Readers](#)

[Log Comment](#)

Testing Proposal_Bianca Krysztof

SF-42400000181

SF424

Descriptive Title: Testing Proposal_Bianca Krysztof
Submission Type: New
PDF Version(s): [\[View\]](#)

Start Date: 1/1/2021
End Date: 12/31/2023

Agency
Tracking Number: 4343611
Grant
Tracking Number: GRANT00725125
Received Date/Time: 3/12/2020 11:32 PM -04:00
Status Updated: 3/12/2020 11:41 PM -04:00
Principal Investigator: Simms (pi), Rebecca
Authorized Representative: Authorized Organization Representative, Test
Contact Person: Lambert, Ava

FOA: PKG00037235/PA-DD-R01(FOA000000003)
Date Modified: 3/14/2020 6:37 PM

Track Your Proposal

- Next Steps**
- View Funding Proposal
 - Printer Version
 - Create Document Review
-
- Team Disclosure Status
 - Manage Relationships
 - Manage Tags
 - Create Agreement
 - Add Attachments
 - Copy
 - Send Email
 - Manage Guest List
 - Add Comment

UM: Custom Funding Proposal Workspace

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health (NIH)
Internal Submission Deadline:	6/2/2020
SF424 Link:	SF-42400000181

Budget Information

Starting Date:	1/1/2021
Number of Periods:	3
Total Direct:	\$705,000
Total Indirect:	\$333,305
Total:	\$1,038,305

Funding Awards

ID	Name	State	Recipient	Sponsor	Start Date	End Date
IBIS00000029	Testing Proposal_Bianca Krysztof	Draft	Gastroenterology	National Institutes of Health (NIH)	1/1/2021	12/31/2023

1 items < page 1 of 1 > 10 / page

Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	...
SF424 Link:	SF-42400000181							
SF424 Tracking#:	GRANT00725125							
SF424 Received Date/Time:	3/12/2020 11:32 PM -04:00							
SF424 Status Updated:	3/12/2020 11:41 PM -04:00							
SF424 Current State:	Federal Funding Agency Tracking Number Assigned							



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New Terminology

New Terminology

- Ancillary Review
- Funding Award
- Funding Proposal
- Guest List
- SmartForm
- Specialist
- SPO
- State
- Study Staff
- 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.

Workspace

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

The screenshot displays the 'Project Champions (Nov)' workspace. At the top right, the proposal ID 'FP00000002' and the type 'Funding Proposal' are shown. The main content is divided into 'Proposal Information' and 'Budget Information' sections. The 'Proposal Information' table lists details such as PD/PI (Rebecca Simms), Department (Gastroenterology), Specialist (Ava Lambert), Sponsors (Spencer Foundation), and Internal Submission Deadline (11/21/2019). The 'Budget Information' table shows Starting Date (7/1/2020), Number of Periods (2), Total Direct (\$300,154), Total Indirect (\$104,407), and Total (\$404,561). Below these is a 'Working Budgets' table with columns for Name, SmartForm, Date Modified, State, Funding Source, Total, and In Financials?. It lists two budget items: 'Spencer Foundation' and 'Cost Sharing for Salary and Equipment'. A navigation bar at the top includes tabs for Budgets, SF424 Summary, History, Reviewers, Attachments, Financials, Reviewer Notes, Related Projects, and Change Log. A left sidebar contains various management actions like 'View Funding Proposal', 'Printer Version', and 'Manage Ancillary Reviews'. The University of Miami logo is visible in the bottom left corner.

Pending Sponsor Review

Project Champions (Nov) FP00000002 Funding Proposal

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

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	Spencer Foundation
Internal Submission Deadline:	11/21/2019

Budget Information

Starting Date:	7/1/2020
Number of Periods:	2
Total Direct:	\$300,154
Total Indirect:	\$104,407
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

Activities

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

Activities

The screenshot shows a workspace for 'Project Champions (Nov)'. On the left, a sidebar contains a list of activities under the heading 'Next Steps'. A red box highlights this list, with an arrow pointing to the 'Activities' text. The activities include: 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, and Add Comment. The main workspace area displays 'Proposal Information' and 'Budget Information' for a funding proposal (FP00000002). Below this, there are tabs for 'Budgets', 'SF424 Summary', 'History', 'Reviewers', 'Attachments', 'Financials', 'Reviewer Notes', 'Related Projects', and 'Change Log'. A 'Working Budgets' table is shown with columns for Name, SmartForm, Date Modified, State, Funding Source, Total, and In Financials?. The table lists two items: 'Spencer Foundation' and 'Cost Sharing for Salary and Equipment'. A pagination bar at the bottom indicates '2 items', 'page 1 of 1', and '10 / page'.

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

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



Actions

Actions: Refer to the 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

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

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

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	Spencer Foundation
Internal Submission Deadline:	11/21/2019

Budget Information

Starting Date:	7/1/2020
Number of Periods:	2
Total Direct:	\$300,154
Total Indirect:	\$104,407
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

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Navigating the System

Dashboard

- My Inbox (to-do list – items that require action from you)
 - Proposals
 - Awards
 - Agreements
 - Budgets
- My Reviews Tab
- Recently Viewed
- Navigate between Agreements and Grants from top navigation bar

The screenshot shows the Huron Research Suite dashboard. The top navigation bar includes 'Dashboard', 'Agreements', 'Grants', and 'SF424 Center'. A callout box highlights the 'Agreements' and 'Grants' tabs with the text 'Navigate between Agreements and Grants modules from these tabs'. Below the navigation bar, there are two tabs: 'My Inbox' and 'My Reviews'. The 'My Inbox' tab is active, displaying a table of items. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. The 'Recently Viewed' sidebar on the left lists several items with their IDs and names.

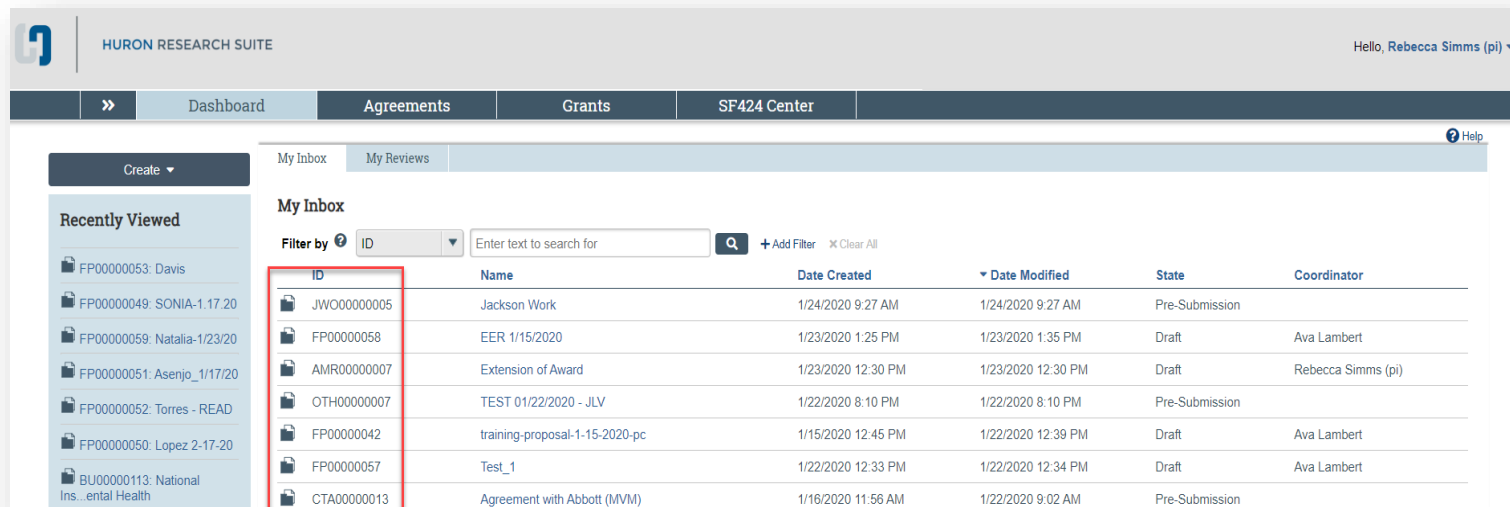
ID	Name	Date Created	Date Modified	State	Coordinator
JWO00000005	Jackson Work	1/24/2020 9:27 AM	1/24/2020 9:27 AM	Pre-Submission	
FP00000058	EER 1/15/2020	1/23/2020 1:25 PM	1/23/2020 1:35 PM	Draft	Ava Lambert
AMR00000007	Extension of Award	1/23/2020 12:30 PM	1/23/2020 12:30 PM	Draft	Rebecca Simms (pi)
OTH00000007	TEST 01/22/2020 - JLV	1/22/2020 8:10 PM	1/22/2020 8:10 PM	Pre-Submission	
FP00000042	training-proposal-1-15-2020-pc	1/15/2020 12:45 PM	1/22/2020 12:39 PM	Draft	Ava Lambert
FP00000057	Test_1	1/22/2020 12:33 PM	1/22/2020 12:34 PM	Draft	Ava Lambert
CTA00000013	Agreement with Abbott (MVM)	1/16/2020 11:56 AM	1/22/2020 9:02 AM	Pre-Submission	

Unique ID

Each record contains a unique ID that can be used to identify the type of record.

For example:

- Funding Proposals begin with “FP”
- Awards migrating over begin with “AWD”
- New Awards in IBISResearch begin with “IBIS”



HURON RESEARCH SUITE

Hello, Rebecca Simms (pi)

Dashboard Agreements Grants SF424 Center

My Inbox My Reviews

My Inbox

Filter by ID Enter text to search for + Add Filter X Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
JWO00000005	Jackson Work	1/24/2020 9:27 AM	1/24/2020 9:27 AM	Pre-Submission	
FP00000058	EER 1/15/2020	1/23/2020 1:25 PM	1/23/2020 1:35 PM	Draft	Ava Lambert
AMR00000007	Extension of Award	1/23/2020 12:30 PM	1/23/2020 12:30 PM	Draft	Rebecca Simms (pi)
OTH00000007	TEST 01/22/2020 - JLV	1/22/2020 8:10 PM	1/22/2020 8:10 PM	Pre-Submission	
FP00000042	training-proposal-1-15-2020-pc	1/15/2020 12:45 PM	1/22/2020 12:39 PM	Draft	Ava Lambert
FP00000057	Test_1	1/22/2020 12:33 PM	1/22/2020 12:34 PM	Draft	Ava Lambert
CTA00000013	Agreement with Abbott (MVM)	1/16/2020 11:56 AM	1/22/2020 9:02 AM	Pre-Submission	

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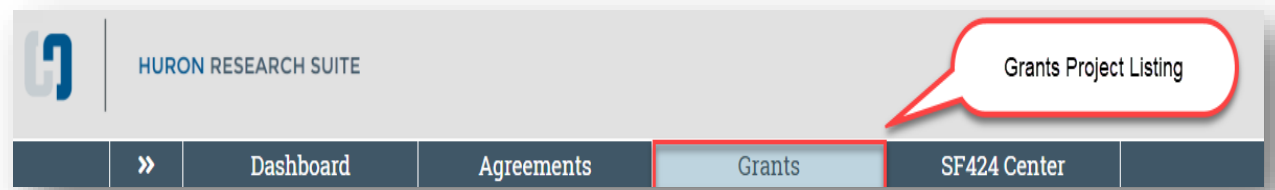
Grants Project Listing Page

Grants Project Listing Page

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

Users have permission to see records (Proposals, awards, and agreements) they are associated with as the following:

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



Grants Project Listing Page

- The Funding Proposal and Awards pages contain all proposals and awards you have permission to see.
- The tabs represent different states throughout the workflow
- The first tab contains a list of all records, regardless of the state

Examples: Draft, Internal, Review, Specialist Review, Awarded, Completed

HURON RESEARCH SUITE

Grants Project Listing

Dashboard Agreements Grants SF424 Center

Funding Proposal Complex Projects Awards Document Review Reports Help Center

Funding Proposal

Create Funding Proposal

Proposals Draft Internal Review Sponsor Review Awarded Completed

Sub-navigator bar

Tabs

Filter by ID Enter text to search for + Add Filter x Clear All

ID	Name	SmartForm	State	PI	Primary Sponsor
FP0000049	SONIA-1.17.20	[Edit]	Specialist Review	Simms (pi)	National Institutes of Health

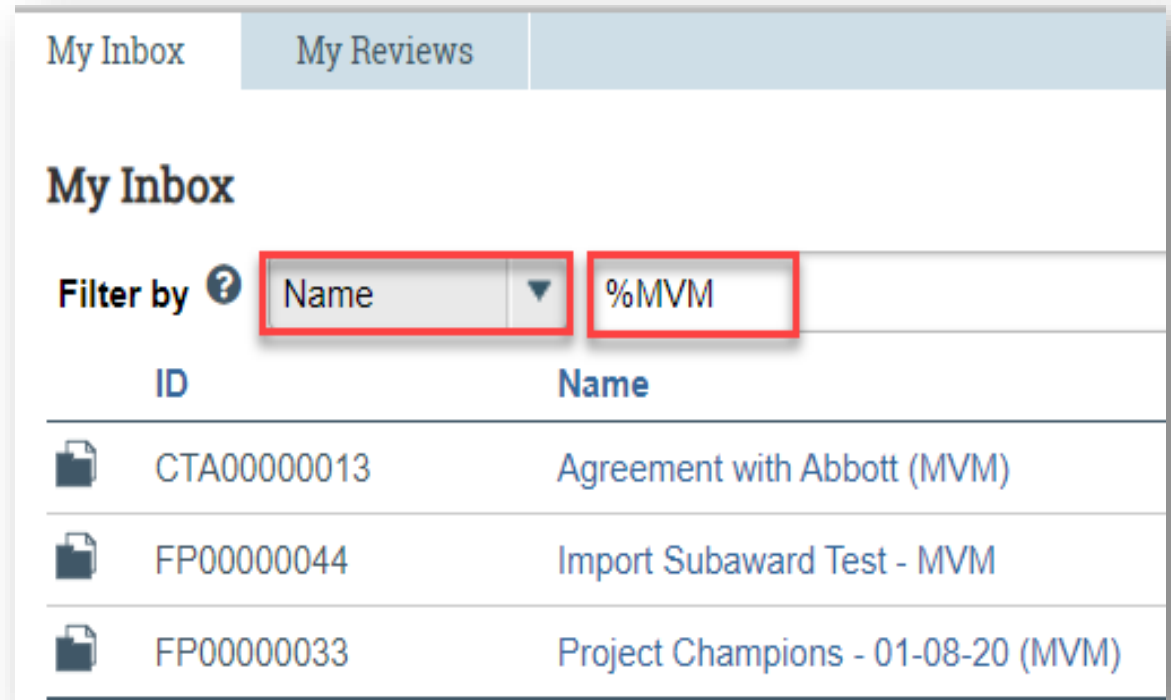
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How To Search For Records

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)

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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



Understanding Email Notifications

Department Review:
Response Pending
from PI

Next Steps

Edit Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

Submit Changes To
Department Reviewer

Withdraw Proposal

Manage Ancillary Reviews

Create-Update SF424

Update SF424 Research Plan

FP00000064

Funding Proposal

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health
Internal Submission Deadline:	6/2/2020
SF424 Link:	SF-42400000157

Budget Information

Starting Date:	1/1/2021
Number of Periods:	2
Total Direct:	\$220,000
Total Indirect:	\$88,275
Total:	\$308,275

Budgets

SF424 Summary

History

Reviewers

Attachments

Financials

Reviewer Notes

...

Activity

Author

Activity Date

Changes Requested By Department Salary is incorrect. The budget requires change.	Faller, Emily	3/16/2020 10:53 PM
Submitted for Department Review	Simms (pi), Rebecca	3/11/2020 11:58 AM
SF424 Created or Updated	Simms (pi), Rebecca	3/11/2020 11:39 AM
Ancillary Review Submitted	Arm (irbch), Richard	3/11/2020 11:36 AM

Manage Tags/Scientific Classification

- Submit For Department Review
- Withdraw Proposal
- Manage Ancillary Reviews
- Create-Update SF424
- Manage Relationships
- Manage Tags**
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email
- Manage Guest List
- Add Comment

Filter by Tag

1-25 of 36

Tag
<input type="checkbox"/> Aging
<input type="checkbox"/> Cystic Fibrosis
<input type="checkbox"/> Psychology
<input type="checkbox"/> Clinical Pharmacology
<input type="checkbox"/> Pulmonology
<input type="checkbox"/> Transplantation
<input type="checkbox"/> HIV/AIDS
<input type="checkbox"/> Engineering
<input type="checkbox"/> Marine Ecosystem and Society
<input type="checkbox"/> Social Science
<input type="checkbox"/> Nutrition

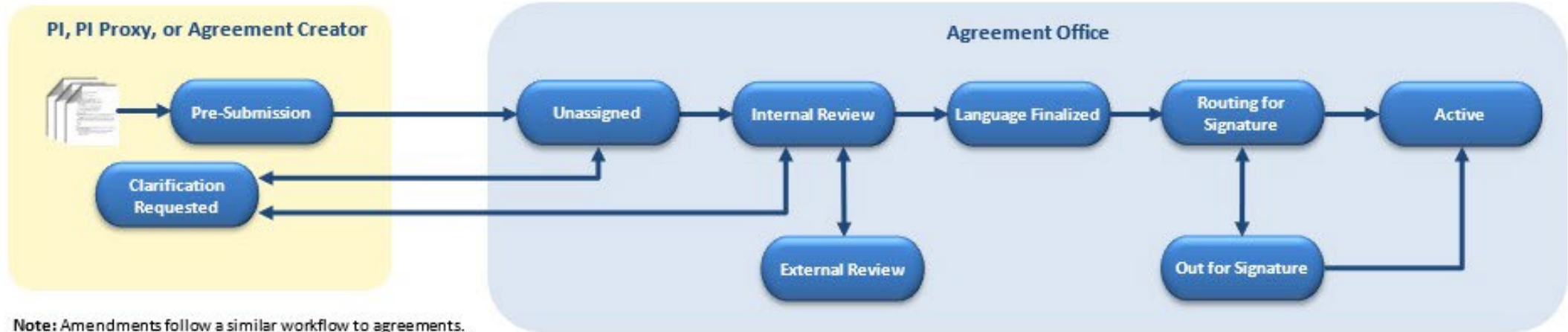
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Agreements

Agreement Workflow

Workflow States and Transitions



Unique IDs

IBISResearch Module	Acronym	ID Example	Definition
Agreements	CTA	CTA00000875	Clinical Trial Agreement – Agreements covering the terms for a clinical trial to study investigational drugs or devices between the sponsor that may be providing the drug or device, the financial support and/or proprietary information and the institution that may be providing data and/or results. This excludes lab testing agreements.
	DUA	DUA00000534	Data Use Agreement – govern the transfer and use of specific data between organizations. ORA processes DUAs that are directly related to a sponsored research project. All other DUAs are processed by the Office of Privacy and Data Security (and should be submitted to that office accordingly).

Unique IDs

IBISResearch Module	Acronym	ID Example	Definition
Agreements	MTA	MTA00000099	Inbound Material Transfer Agreement – are contracts covering the terms for the exchange of materials between two organizations, when the recipient intends to use it for his or her own research purposes. MTAs provide the rights of both the receiver and the provider of these materials. ORA processes INBOUND MTAs where material is being provided at no cost to UM. MTAs do not involve payment of funds for the materials. An “MTA” involving the payment of funds is a purchase agreement (and should be processed accordingly to the applicable central office).
	NDA	NDA00000023	Inbound Non-Disclosure Agreement – also known as confidentiality agreements. Protect information that is not yet in the public domain by limiting further disclosure and use by the recipient. ORA handles NDAs, covering information disclosed from a third party to UM relating to research, intellectual property, and/or innovations.

Unique IDs

IBISResearch Module	Acronym	ID Example	Definition
Agreements	JWO	JWO0000021	Jackson Work Order – is an agreement between Jackson Health System (under the Master Research Collaboration Agreement between UM and Jackson Health System). The Jackson Work Order (JWO) outlines terms and conditions in which the Jackson Health system will facilitate research and facilities for conducting studies which UM is engaged in. The Work Order also often includes a budget outlining funds UM will pay the Jackson Health System for the service provide by them.
	MA	MA00005544	Master Agreement – also known as Master Sponsored Agreements are umbrella agreements where the parties agree on certain terms and conditions for future research projects to be awarded as tasks or work orders.

Unique IDs

IBISResearch Module	Acronym	ID Example	Definition
Agreements	SA	SA00000156	Sponsored Agreement – is a contract between UM and another party to conduct research at UM, whereby UM is receiving funds to support the research. This includes applied research, basic research, developmental research, research training, research fellowship, instruction, and other sponsored agreements.
	OS	OS00005521	Outgoing Subagreement –agreements issued by UM to another entity to perform portions of work under a sponsored project. The subagreement terms include the flow down of terms and conditions from a prime award agreement.
	OTH	OTH0000549	Other Agreements – agreements for patient services, social services or infrastructure support that are neither for research, instruction, fellowships, clinical trials, nor research training. Includes, Collaboration Agreement, Memorandum of Understanding, Teaming Agreement, Interpersonnel Agreements (IPAs) and others.

Related Projects

Submit For Department Review

Withdraw Proposal

Manage Ancillary Reviews

Create-Update SF424

Manage Relationships

Manage Tags

Create Agreement

Add Attachments

Budgets SF424 Summary History Reviewers Attachments Financials **Related Projects** ...

Related Projects

Filter by ? ID + Add Filter x Clear All

ID	Name	Owner	Organization	Project Type	Project Status	Modified Date
MTA00000088	Agreement for: Training For MVM 3/11/2020	Orlando Max (rev1)	Huron Consulting, Inc.	Agreement	Active	3/16/2020 6:59 PM

1 items page of 1 / page



Agreement Workspace

Active

CTA00000005

Agreement for: Test Industry Proposal-DSM 031620

Created by: Carmen Alverado (coord)
Agreement Manager: Rebecca Simms (pi)
Owner: Dugald MacIntyre
Created: 3/16/2020 3:29 PM
Received: 3/16/2020 3:48 PM
Modified: 3/16/2020 4:41 PM
Effective: 3/16/2020
Expires: 3/15/2024

- Agreement:** Agreement Draft -Final.doc(0.04) ...
- Final agreement:** Agreement Draft -Final.pdf(0.01) ...
- Supporting documents:** Agreement Draft -Final.doc(0.01) ...
 Letter of Indemnification - Final.pdf(0.03) ...

Agreement type: Clinical Trial Agreement
Office: Office of Research Administration (ORA)
Description:



Next Steps

[View Agreement](#)

[Printer Version](#)

[View All Correspondence](#)

[Create Amendment](#)

[Communication](#)

[History](#)

[Contacts](#)

[Snapshots](#)

[Related Projects](#)

Correspondence To Do

Communication Tab (Agreements)

Communication

History

Contacts

Snapshots

Related Projects

Correspondence To Do

Filter by ?

Due Date



Enter text to search for



+ Add Filter

✕ Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
	Orlando Max (rev1)	Email Out	Waiting on Response		Sent ot Sponsor for Signature	3/16/2020

Correspondence Completed

Filter by ?

Due Date



Enter text to search for
















+ Add Filter

✕ Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
	Orlando Max (rev1)	Call In	Completed	Rebecca Simms (pi)	Received Call from the sponsor	3/16/2020
	Orlando Max (rev1)	Call Out	Completed	Rebecca Simms (pi)	Conference Call with PI and Study Team	3/16/2020

History Tab (Agreements)

Communication	History	Contacts	Snapshots	Related Projects
Filter by  Activity <input type="text" value="Enter text to search for"/>  + Add Filter x Clear All				
Activity	Author	▼ Activity Date		
<input checked="" type="checkbox"/> Activated	Max (rev1), Orlando	3/16/2020 6:59 PM		
 Sent Out for Signature	Max (rev1), Orlando	3/16/2020 6:58 PM		
<input checked="" type="checkbox"/> Approved Language	Max (rev1), Orlando	3/16/2020 6:57 PM		
 Agreement Revised	Max (rev1), Orlando	3/16/2020 6:57 PM		
 Final Pfizer.pdf				
 Agreement Generated	Max (rev1), Orlando	3/16/2020 6:56 PM		
 Moved to Internal Review	Max (rev1), Orlando	3/16/2020 6:55 PM		
Change required by sponsor				
 Agreement Generated	Max (rev1), Orlando	3/16/2020 6:54 PM		
 Correspondence Logged	Max (rev1), Orlando	3/16/2020 6:52 PM		
 Converted to PDF	Max (rev1), Orlando	3/16/2020 6:51 PM		
 Sent Out for Signature	Max (rev1), Orlando	3/16/2020 6:50 PM		
 Agreement Emailed	Max (rev1), Orlando	3/16/2020 6:50 PM		
<input checked="" type="checkbox"/> Approved Language	Max (rev1), Orlando	3/16/2020 6:46 PM		
 Agreement Generated	Max (rev1), Orlando	3/16/2020 6:45 PM		

Questions and Answers



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Demo

IBISResearch