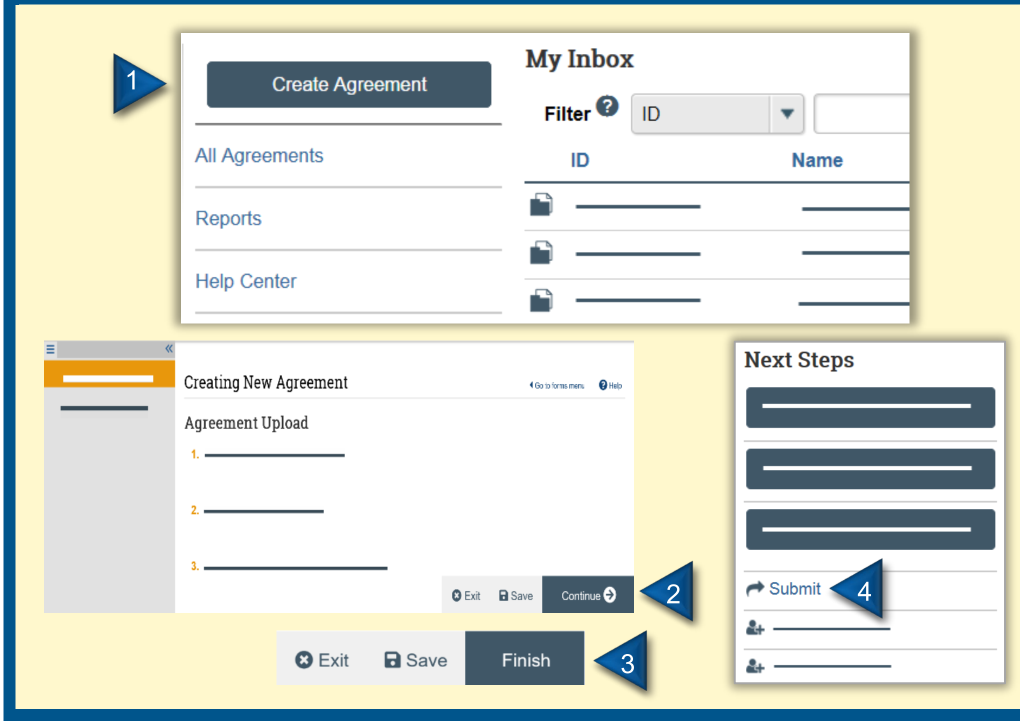
UNIVERSITY OF MIAMI

IBIS Research

Agreements Quick Reference

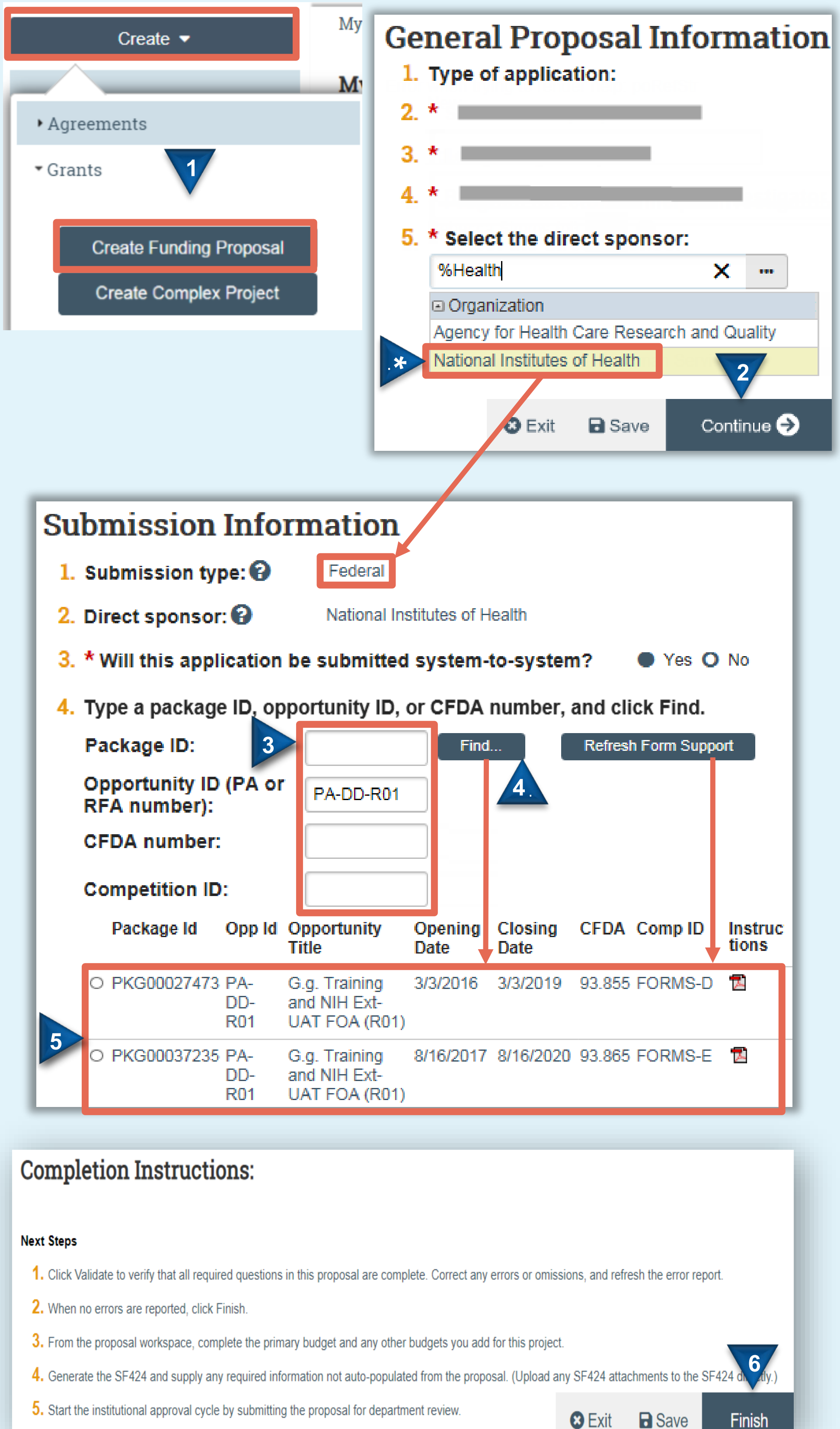
Submit an Agreement



1. From My Inbox, click the **Create Agreement** button.
2. Complete the pages. To move to the next page, click **Continue**. Use left navigator to jump to specific page.
3. On the last page, click **Finish**.
4. On the left, click **Submit**.
5. Click **OK** to accept the statement and submit the agreement.

Create a Funding Proposal

If you are a PI, study staff member, or a grants specialist, you can create funding proposals in the IBISResearch system. This topic shows how to create funding proposal, and check it for errors and omissions. If you are submitting a Clinical Trial Agreement (CTA) you must first create a funding proposal to accompany the CTA.



Where do I start?

1. From **My Inbox**, click **Create,** then, **Create Funding Proposal**.

How do I get the correct forms?

2. Fill out each page and click **Continue**. (Asterisked fields are required.)

Which direct sponsor you select determines whether you are subsequently queried for Federal or non-Federal grant information. Once you specify the sponsor, Grants creates a budget you can complete.

3. To search for a Federal opportunity, type in one or more of these search criteria and click **Find**. Grants.gov returns matching opportunities, their requirements, and forms (if supported by Huron SF424). **Note**: Competition ID can only be used with other criteria.
4. To replace the currently attached forms with any supported updates, click **Refresh Form Support**.
5. Select the desired opportunity.

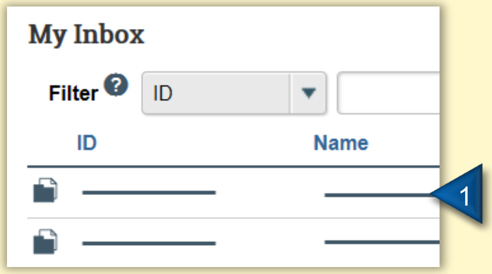
How do I finish the proposal?

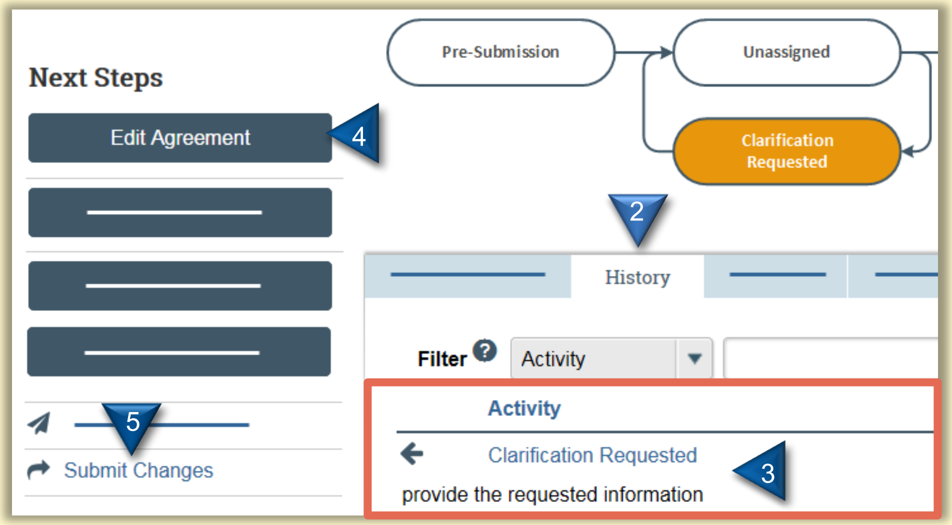
6. After completing all required fields and any optional fields you choose on the proposal pages, follow the completion instructions on the last page, and then click **Finish**.

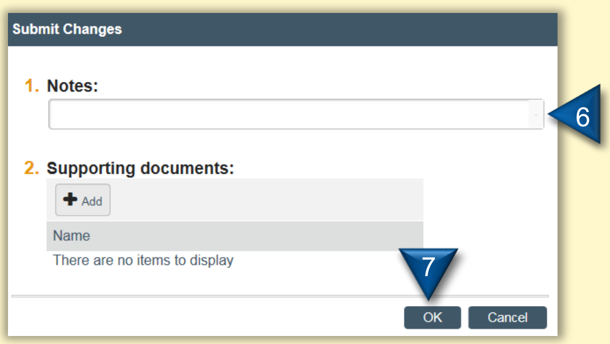
What Next?

Create the Agreement from the Funding Proposal and Submit for Department Review.

Respond to Reviewer Requests



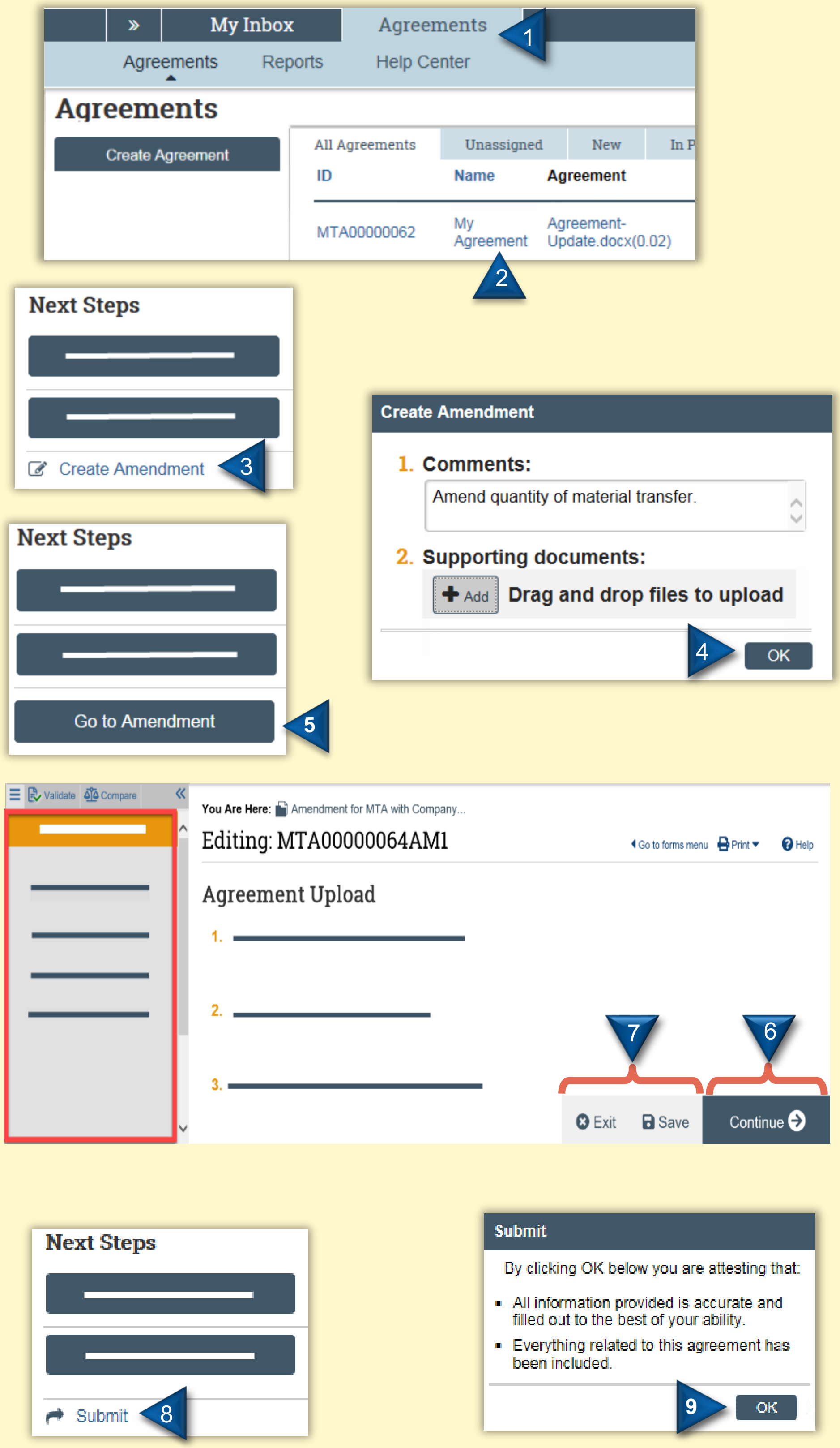




1. From My Inbox, click the agreement name to open it.
2. Click the **History** tab.
3. Look for the **Clarification Requested** activity and review any reviewer comments.
4. To update the agreement, click **Edit Agreement** on the left and make the changes. If not, go to the next step. You will be able to enter a response for the reviewer before submitting.
5. Click **Submit Changes**.
6. (Optional) In the Notes box, type a response to the reviewer's comments or questions.
7. Click **OK**.

Create an Amendment

You can create amendments for agreements in the Active, Expired, and Evergreen states. Only one amendment can be in progress at a time.



1. In the top navigation, click **Agreements**.
2. On the **All Agreements** tab, click the name of the agreement to amend.
3. At the left of the workspace click **Create Amendment**.
4. Add any comments and supporting documents you think necessary, then click **OK**.
5. On the left of the workspace, click **Go to Amendment**.
6. Click **Continue** to move to the next page, or use left navigator to jump to specific page, and make the necessary changes.

   Note: The Agreement creator has the same edit rights to the amendment as the Agreement Manager/PI.
7. When satisfied with your changes, click **Save**, and then **Exit**.
8. At the left of the workspace, click **Submit** to submit the Amendment for review.
9. Click **OK** to confirm the amendment is complete and correct.

Appendix –

- **Agreement Types and Required Documentation**
- **Agreement Workflow**