

# IBIS Research

## Agreements Quick Reference

<a href="#">Submit an Agreement.....</a>	<a href="#">2</a>
<a href="#">Create a Funding Proposal.....</a>	<a href="#">3</a>
<a href="#">Respond to Reviewer Requests .....</a>	<a href="#">4</a>
<a href="#">Create an Amendment .....</a>	<a href="#">5</a>
<a href="#">Appendix –Agreement Workflow .....</a>	<a href="#">6</a>
<a href="#">Appendix – Agreement Types and Documentation.....</a>	

## Submit an Agreement

**1** From My Inbox, click the **Create Agreement** button.

My Inbox	
ID	Name
	_____
	_____
	_____

**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.

The screenshot shows the 'Create' dropdown menu with 'Grants' selected (1). Below it are buttons for 'Create Funding Proposal' and 'Create Complex Project'. The 'General Proposal Information' form has the following fields:

- Type of application:
- \* [Redacted]
- \* [Redacted]
- \* [Redacted]
- \* Select the direct sponsor:
  - Search: %Health
  - Organization: Agency for Health Care Research and Quality
  - National Institutes of Health** (2)

Buttons at the bottom: Exit, Save, Continue.

## 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.

The 'Submission Information' form includes:

- Submission type: **Federal**
- Direct sponsor: National Institutes of Health
- \* Will this application be submitted system-to-system?  Yes  No
- Type a package ID, opportunity ID, or CFDA number, and click Find.
  - Package ID: [Redacted] (3)
  - Opportunity ID (PA or RFA number): PA-DD-R01 (4)
  - CFDA number: [Redacted]
  - Competition ID: [Redacted]

Buttons: Find..., Refresh Form Support.

Package Id	Opp Id	Opportunity Title	Opening Date	Closing Date	CFDA	Comp ID	Instruc tions
<input type="radio"/> PKG00027473	PA-DD-R01	G.g. Training and NIH Ext-UAT FOA (R01)	3/3/2016	3/3/2019	93.855	FORMS-D	
<input type="radio"/> PKG00037235	PA-DD-R01	G.g. Training and NIH Ext-UAT FOA (R01)	8/16/2017	8/16/2020	93.865	FORMS-E	

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**.

## Completion Instructions:

### Next Steps

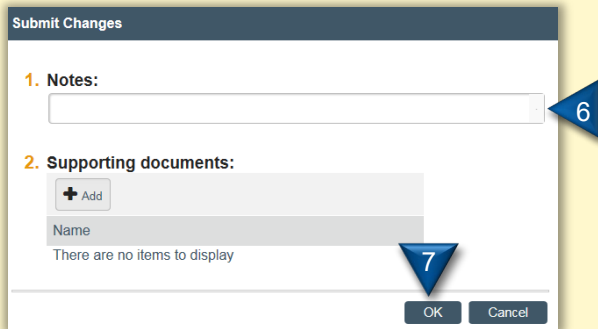
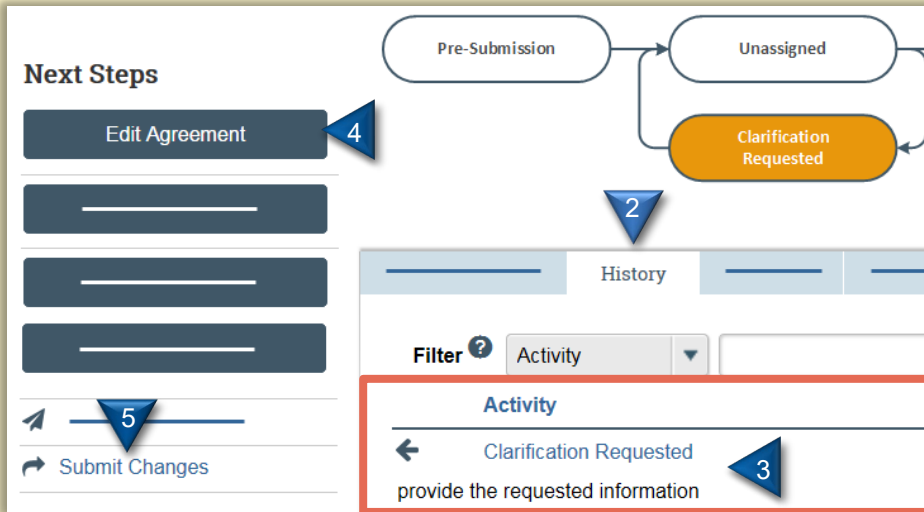
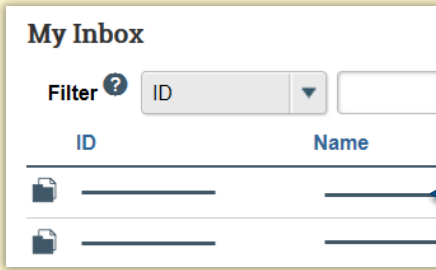
1. Click Validate to verify that all required questions in this proposal are complete. Correct any errors or omissions, and refresh the error report.
2. When no errors are reported, click Finish.
3. From the proposal workspace, complete the primary budget and any other budgets you add for this project.
4. Generate the SF424 and supply any required information not auto-populated from the proposal. (Upload any SF424 attachments to the SF424 opportunity.)
5. Start the institutional approval cycle by submitting the proposal for department review.

Exit Save Finish

## What Next?

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

## Respond to Reviewer Requests



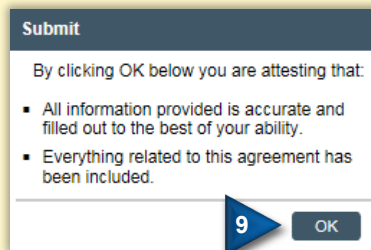
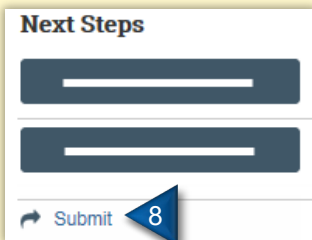
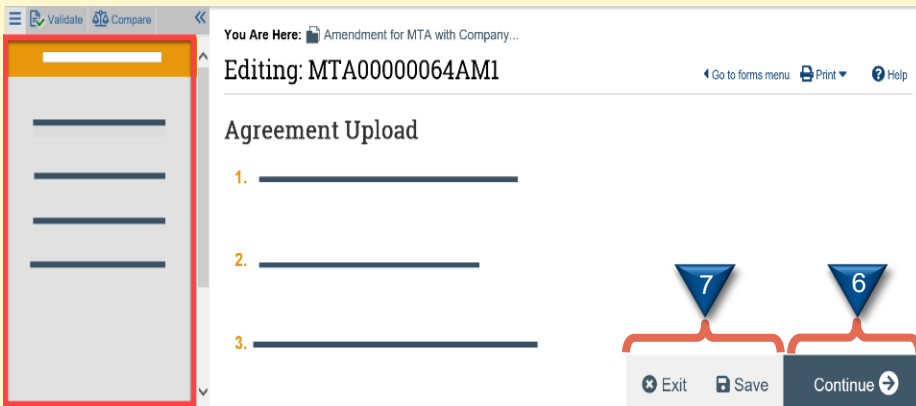
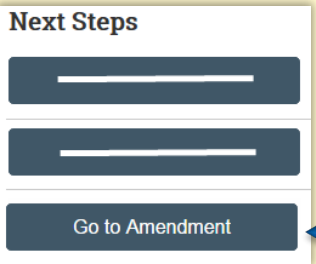
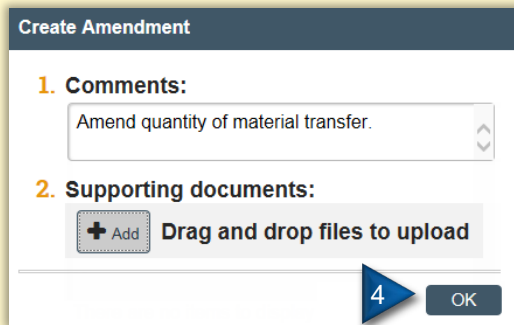
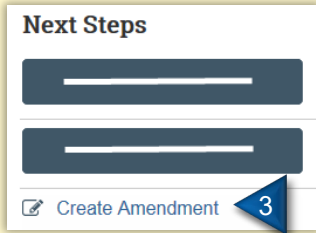
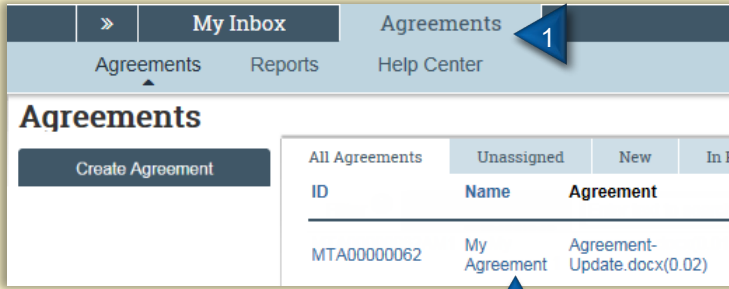
1. From My Inbox, click the agreement name to open it.
2. Click the **History** tab.
3. Look for the **Clarification Requested** activity and review any reviewer comments.
4. To update the agreement, click **Edit Agreement** on the left and make the changes. If not, go to the next step. You will be able 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**