



September 1, 2026

Upcoming Change to Industry Clinical Research and Clinical Trial Submission Process

The Office of Research Administration (ORA) and the Miller School of Medicine Office of the Executive Dean for Research are implementing a process improvement initiative for **industry-sponsored clinical research projects**. Please note clinical research projects include clinical trials. This change is intended to simplify submissions, improve visibility into budget and contract status, and reduce administrative burden.

What Is Changing?

Effective October 1, departments will **no longer create or submit a Funding Proposal (FP) record in IBIS** for industry-sponsored clinical research projects. Instead, departments will submit **only the agreement record**, with the budget review process managed through an ancillary review workflow. This change does **not** apply to other grants or sponsored project submissions (including non-industry funded clinical research projects).

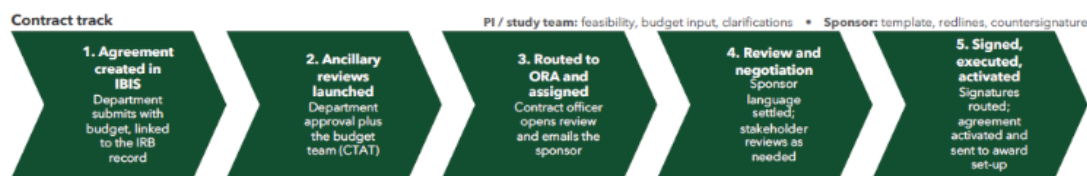
Key Process Changes

- **Single Submission:** The agreement record will serve as the primary submission in IBIS; a separate funding proposal record will no longer be required.
- **Departmental Approval:** Departmental Approval of the submission will be tracked through an ancillary review prior to submission to ORA.
- **Budget Review Tracking:** Budget review and negotiation activities will be tracked through an ancillary review involving the Executive Dean for Research's office and CTAT.
- **Parallel Contract and Budget Review:** Contract negotiation and budget review will proceed simultaneously, helping reduce delays and improve coordination.
- **Workday Reporting Maintained:** Project activity and revenue reporting will continue to be captured in Workday.

Benefits

This streamlined approach removes unnecessary proposal records for projects that do not have a true proposal stage, improves transparency through visible workflow handoffs, and helps accelerate agreement execution while maintaining compliance requirements.

The new process flow is illustrated below:



Budget track runs in parallel. The budget ancillary review opens at step 2 and stays open while the budget is negotiated. When the budget team closes it, that is the contract officer's signal that negotiation is complete and the agreement can move to signature.

One submission

The agreement is the submission - no separate funding proposal record for industry clinical research.

Visible hand-offs

Ancillary reviews keep budget status visible in IBIS, so no one waits on an email to know where things stand.

Faster to execution

Contract and budget advance together, and the executed agreement routes straight to award set-up.

Additional training and information will be provided through upcoming communications and a Research Administrative Symposium session entitled, “**Clinical Research Operations Update: A Panel Discussion on Streamlined Processes**” scheduled for Sept 11th at 10:30AM.

Thank you for your partnership as we continue to improve and streamline research administration processes.

If you have any questions regarding the Agreement Process, please contact the Office of Research Administration at MRA@miami.edu.

If you have any questions regarding the Budget/MCA Process, please contact the Clinical Trial Activation Team (CTAT), EDRO at CTATBudget@med.miami.edu.