

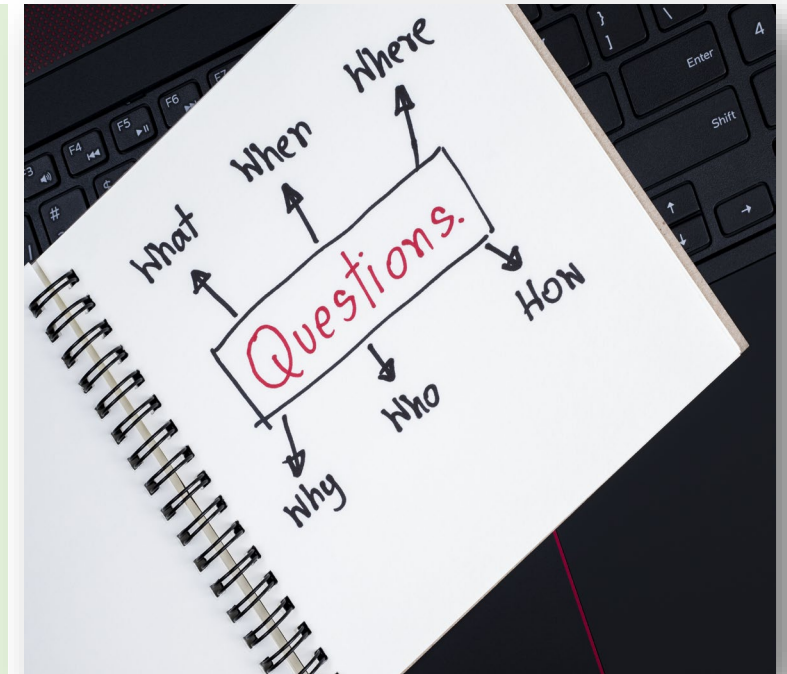
IBISResearch: Agreements

Office of The Vice Provost for Research &
Scholarship (OVPRS)

Workshop Etiquette

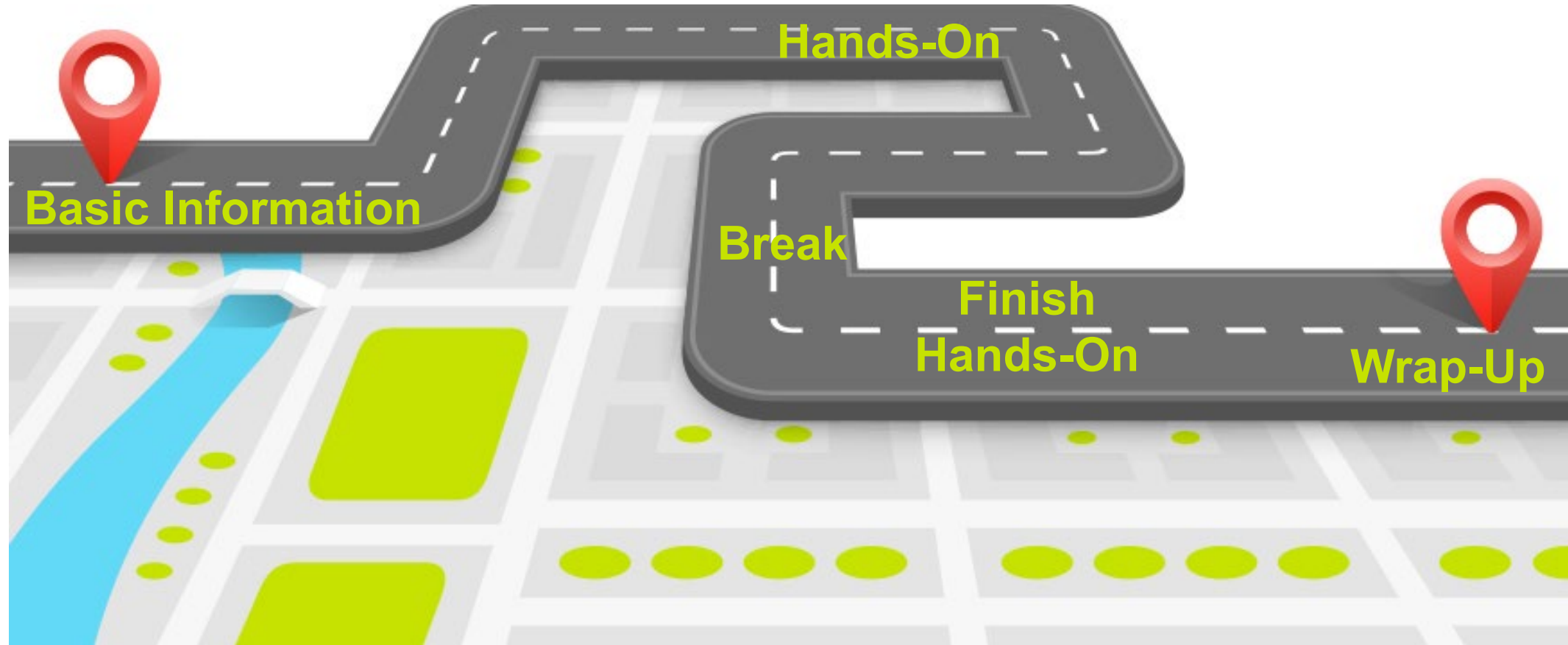


Avoid Multitasking



Ask Questions

Agenda Roadmap



Introductions

What department do you work in?

Type in the chat



Quote

**ALWAYS DO
YOUR BEST.
WHAT YOU
PLANT NOW, YOU
WILL HARVEST
LATER.**

Learning Objectives

After this session you will be able to:

1. Demonstrate the terminology and navigation of the system
2. Practice how to create agreements in IBISResearch





IBISResearch:Terminology

IBISResearch Terminology

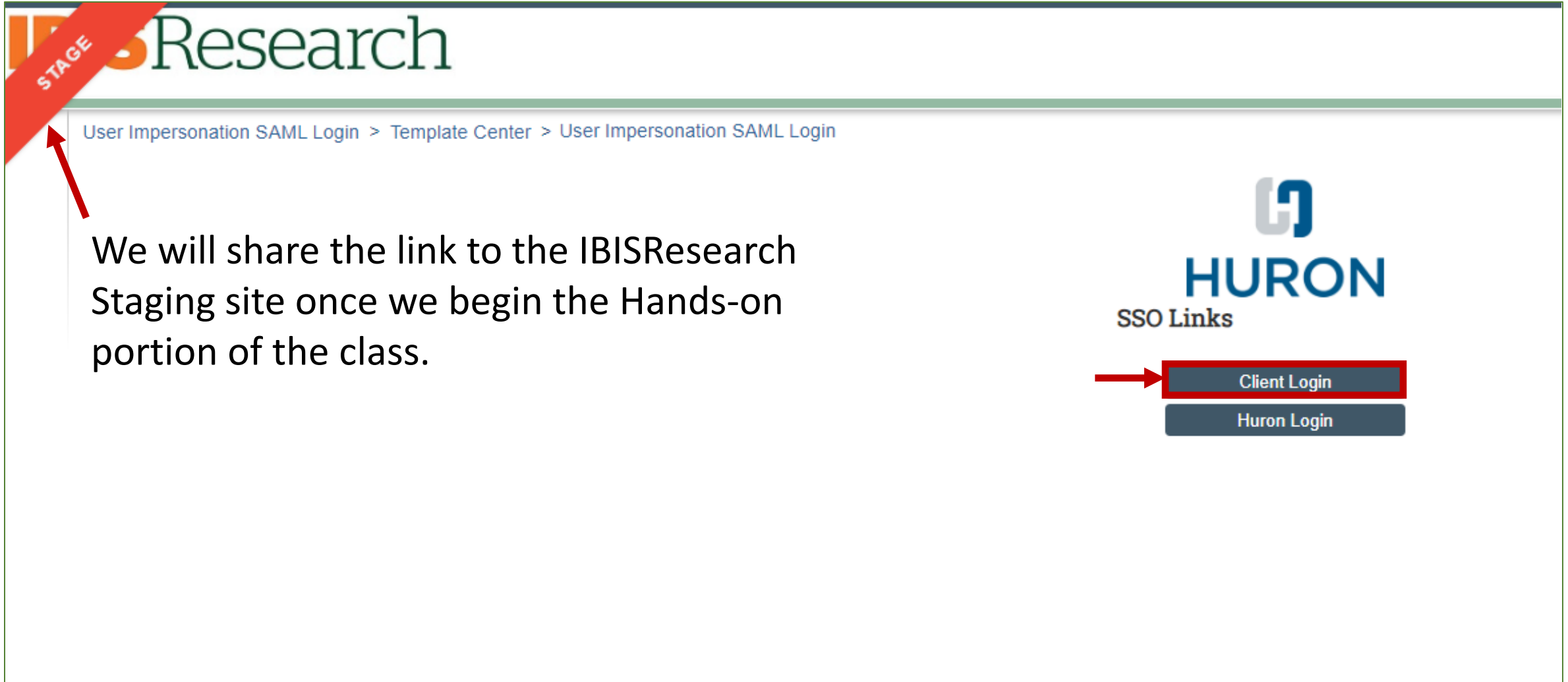
1. Ancillary Review
2. Funding Award
3. Funding Proposal
4. Guest List
5. SmartForm
6. Specialist
7. SPO
8. State
9. Study Staff
10. Tags

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



IBISResearch

STAGE

User Impersonation SAML Login > Template Center > User Impersonation SAML Login

We will share the link to the IBISResearch Staging site once we begin the Hands-on portion of the class.

HURON

SSO Links

Client Login

Huron Login

Sign in using your University of Miami Credentials



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

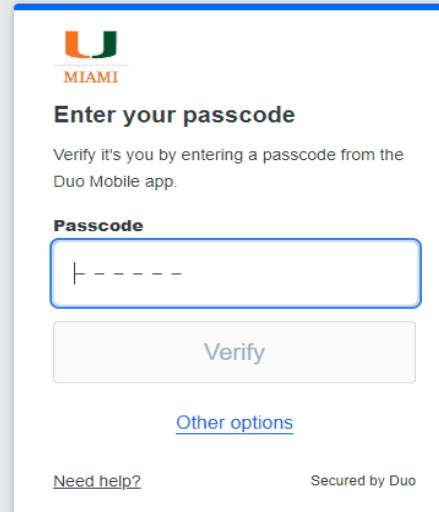
Sign in

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



The image shows a Duo authentication interface for the University of Miami. It features the university's logo at the top left, followed by the text "Enter your passcode" and a brief instruction to verify identity using the Duo Mobile app. Below this is a "Passcode" label and a text input field containing a cursor and five dashes. A "Verify" button is positioned below the input field, and a link for "Other options" is located underneath. At the bottom of the screen, there are links for "Need help?" and the text "Secured by Duo".


MIAMI

Enter your passcode

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

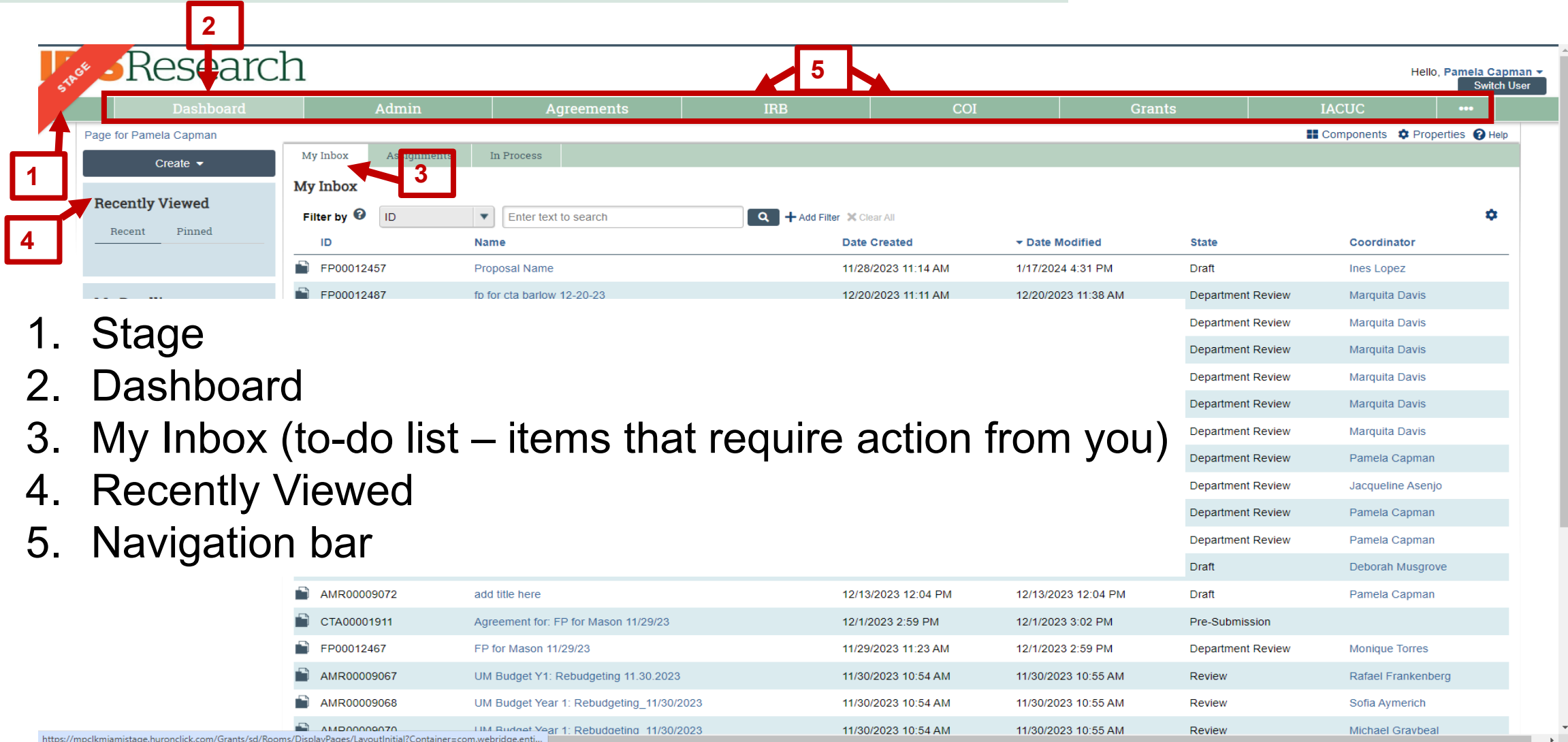
Passcode

Verify

[Other options](#)

[Need help?](#) Secured by Duo

Dashboard



The screenshot shows the Research dashboard interface. A red box highlights the navigation bar at the top, which includes tabs for Dashboard, Admin, Agreements, IRB, COI, Grants, and IACUC. A red arrow labeled '1' points to the 'STAGE' label on the left. A red arrow labeled '2' points to the 'Dashboard' tab. A red arrow labeled '3' points to the 'My Inbox' section, which contains a table of items. A red arrow labeled '4' points to the 'Recently Viewed' section. A red arrow labeled '5' points to the navigation bar. The 'My Inbox' table has the following data:

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
				Department Review	Marquita Davis
				Department Review	Marquita Davis
				Department Review	Marquita Davis
				Department Review	Marquita Davis
				Department Review	Marquita Davis
				Department Review	Pamela Capman
				Department Review	Jacqueline Asenjo
				Department Review	Pamela Capman
				Department Review	Pamela Capman
				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

1. Stage
2. Dashboard
3. My Inbox (to-do list – items that require action from you)
4. Recently Viewed
5. Navigation bar

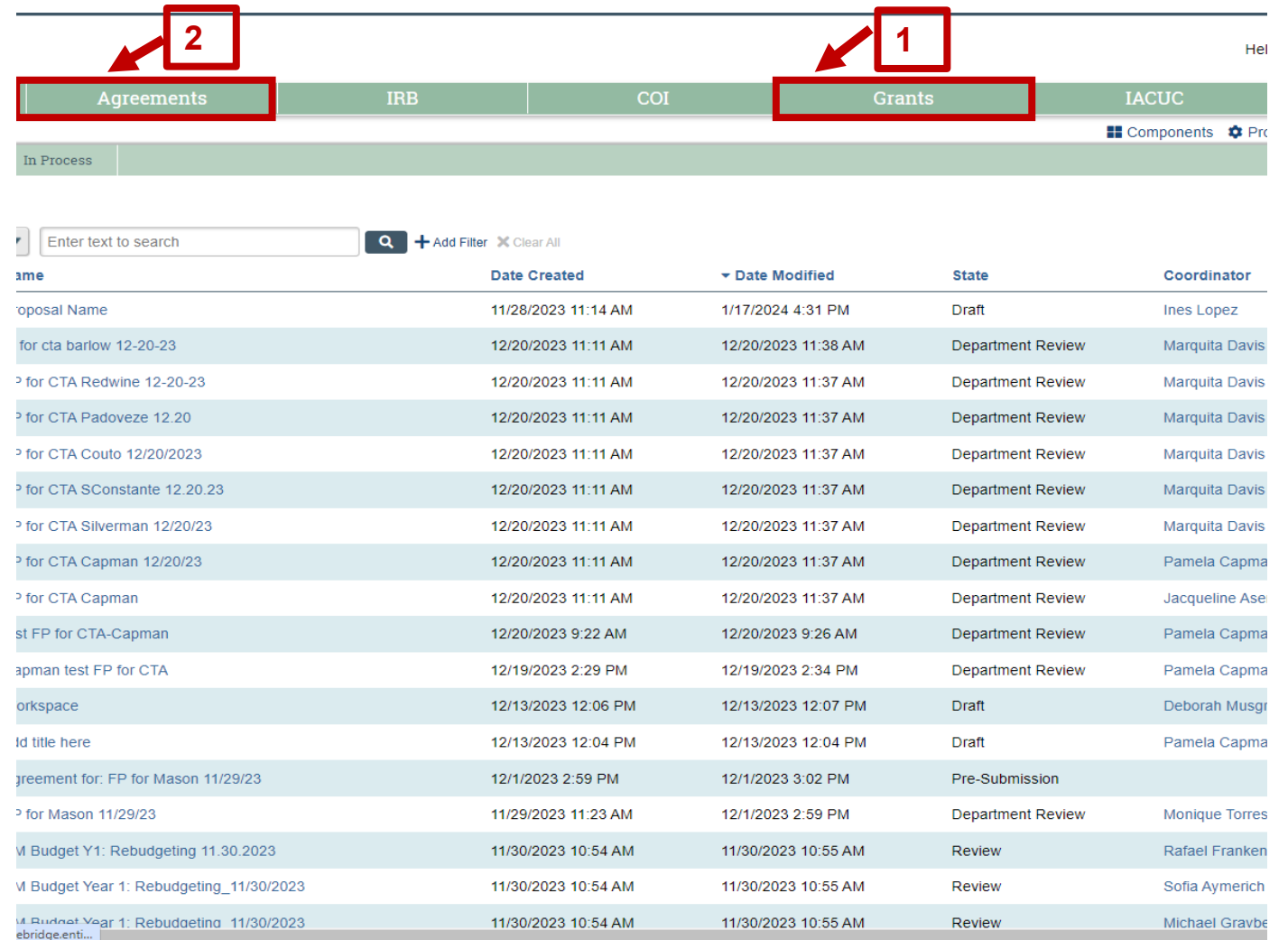
Navigate between Grants & Agreements

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

All Agreements

Agreements

[Components](#)
[Properties](#)
[Permissions](#)

Agreements

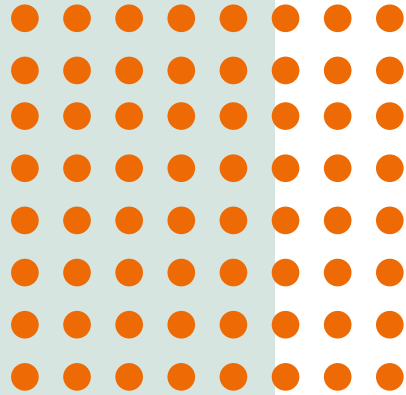
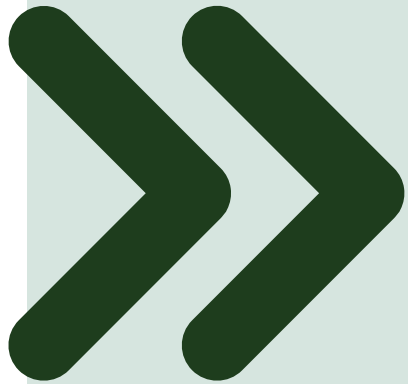
Search

[Create Agreement](#)

[All Agreements](#)
[Unassigned](#)
[New](#)
[In Progress](#)
[Active](#)
[Evergreen](#)
[Archived](#)

Filter by ? ID [+ Add Filter](#) [X Clear All](#)
[Export to CSV](#) ?

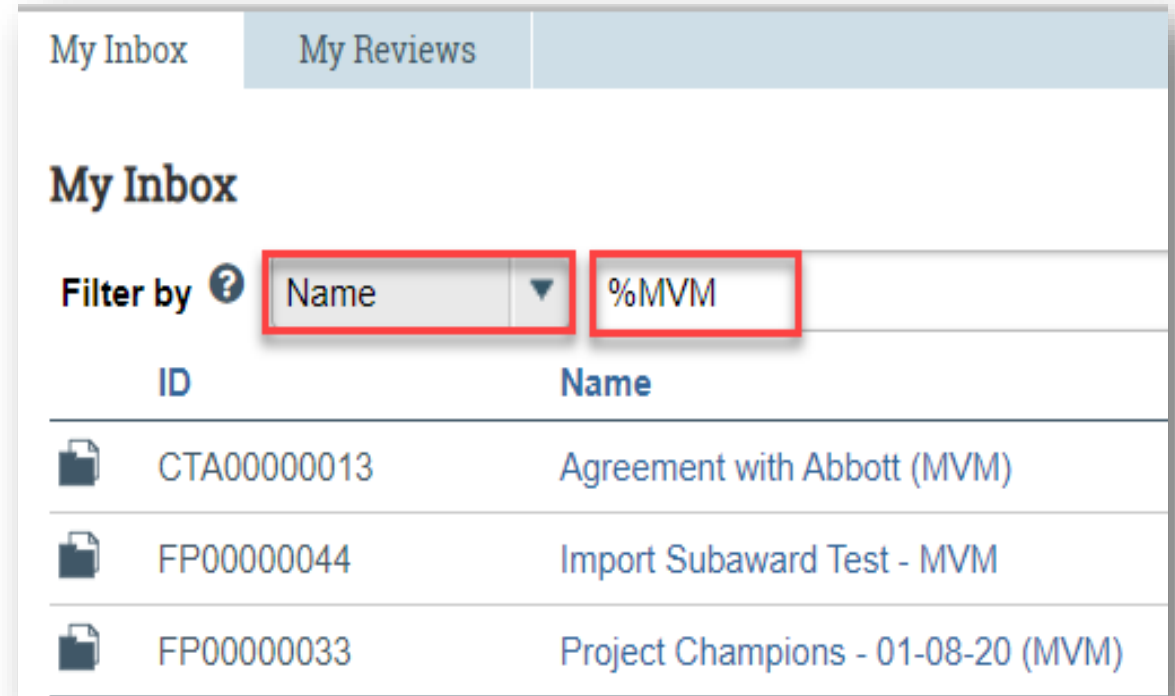
ID	Name	Agreement	Agreement Type	PI (First) PI (Last)	Contracting Party	State	Owner (First)	Owner (Last)	Modified Date
DUA00000366	DATAACCESS AGREEMENT_Levy_01NOV22.docx	DAA_Levy_Target_Pharma_FE.pdf(0.04)	Data Use Agreement	Cynthia Levy	Target Pharmsolutions Inc	Active	Hilary	Cox	1/19/2024 12:00 AM
NDA00001651	Nelson_Octave CDA 04192023	Univ of Miami Nelson CDA 05272023 signed.pdf(0.04)	Inbound Non-Disclosure Agreement	Flavia Nelson	OCTAVE BIOSCIENCE, INC	Active	Andrew	Camner	1/19/2024 12:00 AM
NDA00001126	54767414AMY2009_US_CDA Template_28Sep2021 clean.docx	NDA00001126_Hoffman_Janssen_fully executed by sponsor_8.20.2022.pdf(0.05)	Inbound Non-Disclosure Agreement	James Hoffman	Janssen Research & Development LLC	Active	Jennifer	Richards	1/19/2024 12:00 AM
NDA00001388	Wester_Lassen Mutual NDA template 2022_Wester.doc	Wester_Lassen_NDA00001388 - signed.pdf(0.04)	Inbound Non-Disclosure Agreement	Sara Wester	Lassen Therapeutics	Expired	Andrew	Camner	1/19/2024 12:00 AM
SA00002484	Agreement for: Ceramic Matrix Composites for H2 Combustion	SA2484 Yang UCF FE.pdf(0.04)	Sponsored Agreement	Qingda Yang	University of Central Florida (UCF)	Expired	Ruben	Bilbao	1/19/2024 12:00 AM
OTH00001220	Jennifer Tang Contract Sep 2023 Meeting.doc	Jennifer Tang Contract Sep 2023 Meeting.doc(0.01)	Other	Jennifer Tang	Ferndale	Clarification Requested			1/18/2024 12:00 AM
OTH00001083	Advance Vascular Consulting agreement	Advance Vascular Consulting agreement (0.01)	Other		Advance Vascular LLC	Clarification Requested			1/18/2024 12:00 AM
OS00001394	Outbound Greenwood Genetic Center G. Zhai		Outbound Subagreement	Grace Zhai	Greenwood Genetic Center Inc	Clarification Requested			1/18/2024 12:00 AM
OTH00000774	Symposium Invitation Speakers - Dr Kanner.docx	Symposium Invitation Speakers - Dr Kanner.docx(0.01)	Other	Andres Kanner	Adium Pharma SA	Clarification Requested			1/18/2024 12:00 AM



How to Search for Records

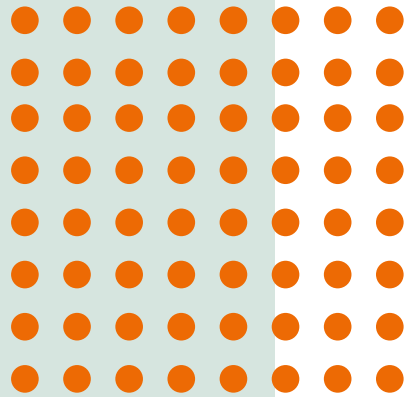
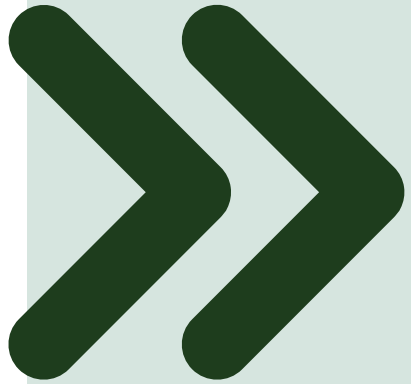
How to Search for Records

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.

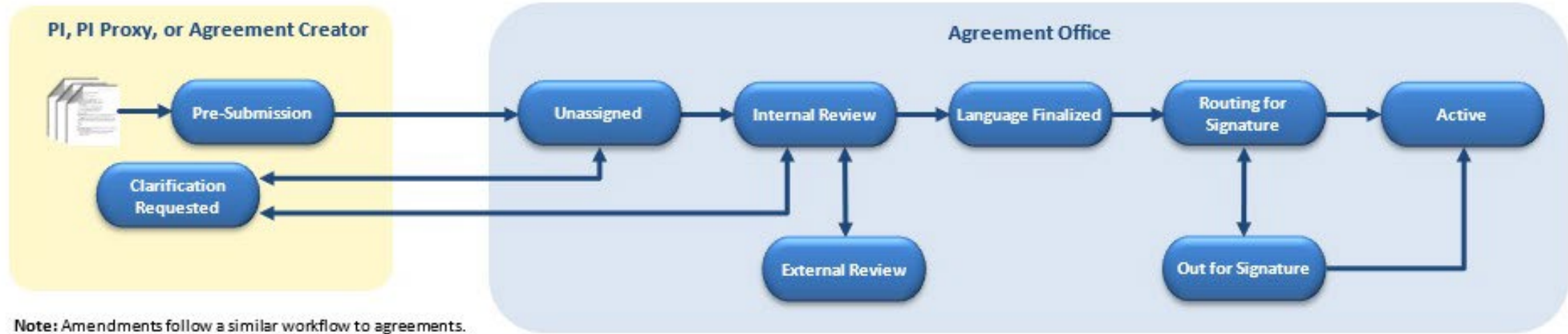
ID	Name
CTA00000013	Agreement with Abbott (MVM)
FP00000044	Import Subaward Test - MVM
FP00000033	Project Champions - 01-08-20 (MVM)

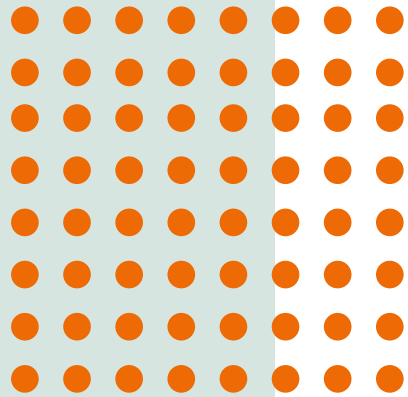
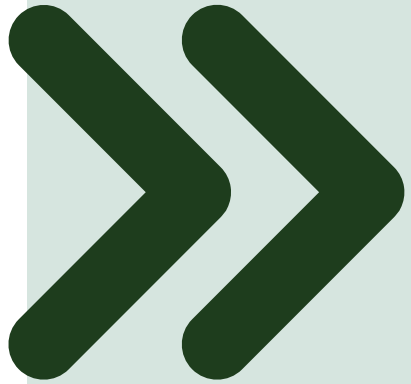


Understanding the Workflow

Agreement Workflow

Workflow States and Transitions





Understanding the Workspace

To Access the Workspace

Research Hello, Pamela Camner [Switch User](#)

Dashboard Admin Agreements IRB COI Grants

Agreements Help Center Reports

Agreements

Agreements

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

Create Agreement

All Agreements Unassigned New In Progress Active Evergreen Archived

Filter by ID + Add Filter X Clear All [Export to CSV](#)

ID	Name	Agreement	Agreement Type	PI (First) PI (Last)	Contracting Party	State	Owner (First)	Owner (Last)	Modified Date
DUA00000366	DATAACCESS AGREEMENT_Levy_01NOV22.docx	DAA_Levy_Target_Pharma_FE.pdf(0.04)	Data Use Agreement	Cynthia Levy	Target Pharmsolutions Inc	Active	Hilary	Cox	1/19/2024 12:00 AM
NDA00001651	Nelson_Octave CDA 04192023	Univ of Miami Nelson CDA 05272023 signed.pdf(0.04)	Inbound Non-Disclosure Agreement	Flavia Nelson	OCTAVE BIOSCIENCE, INC	Active	Andrew	Camner	1/19/2024 12:00 AM
NDA00001126	54767414AMY2009_US_CDA Template_28Sep2021 clean.docx	NDA00001126_Hoffman_Janssen_fully executed by sponsor_8.20.2022.pdf(0.05)	Inbound Non-Disclosure Agreement	James Hoffman	Janssen Research & Development LLC	Active	Jennifer	Richards	1/19/2024 12:00 AM
NDA00001388	Wester_Lassen Mutual NDA template 2022_Wester.doc	Wester_Lassen_NDA00001388 - signed.pdf(0.04)	Inbound Non-Disclosure Agreement	Sara Wester	Lassen Therapeutics	Expired	Andrew	Camner	1/19/2024 12:00 AM
SA00002484	Agreement for: Ceramic Matrix Composites for H2 Combustion	SA2484 Yang UCF FE.pdf(0.04)	Sponsored Agreement	Qingda Yang	University of Central Florida (UCF)	Expired	Ruben	Bilbao	1/19/2024 12:00 AM
OTH00001220	Jennifer Tang Contract Sep 2023 Meeting.doc	Jennifer Tang Contract Sep 2023 Meeting.doc(0.01)	Other	Jennifer Tang	Ferndale	Clarification Requested			1/18/2024 12:00 AM
OTH00001083	Advance Vascular Consulting agreement	Advance Vascular Consulting agreement (0.01)	Other		Advance Vascular LLC	Clarification Requested			1/18/2024 12:00 AM
OS00001394	Outbound Greenwood Genetic Center G. Zhai		Outbound Subagreement	Grace Zhai	Greenwood Genetic Center Inc	Clarification Requested			1/18/2024 12:00 AM
OTH00000774	Symposium Invitation Speakers - Dr Kanner.docx	Symposium Invitation Speakers - Dr Kanner.docx(0.01)	Other	Andres Kanner	Adium Pharma SA	Clarification Requested			1/18/2024 12:00 AM

Workspace

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



Dashboard Admin Agreements IRB COI Grants

Agreements Help Center Reports

Agreements > Example

Pre-Submission MTA00001113
Example

Primary contact: Pamela Capman
Manager/PI: Jennifer Tang
Owner:
Created: 1/22/2024 9:03 AM
Received:
Modified: 1/22/2024 12:10 PM
Effective:
Expires:

Agreement: 1_MTA Agreement for Training.docx(0.01) ...
Final agreement:
Contracting party: Pfizer Inc

Agreement type: Inbound Material Transfer Agreement
Office: Office of Sponsored Research Administration
Responsible Department/Division/Institute: Office of Research Administration - Executive
Description:

Pre-Submission → Unassigned → In Review → Signing → Active
Clarification Requested (between Unassigned and In Review)
Clarification Requested (between In Review and Signing)

There are no Ancillary Reviews to show at this time.

Correspondence History Contacts Snapshots Documents Related Projects

Correspondence To Do

Filter by ? Due Date + Add Filter × Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
No data to display.						

Correspondence Completed

Filter by ? Due Date + Add Filter × Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
----------	-------	------	--------	------------	---------	---------------

Manage Relationships

Submit

Manage Ancillary Reviews

Manage Access

Discard

Copy Agreement

Activities

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



Pre-Submission MTA00001113
Example

Primary contact: Pamela Capman
Manager/PI: Jennifer Tang
Owner:
Created: 1/22/2024 9:03 AM
Received:
Modified: 1/22/2024 12:10 PM
Effective:
Expires:

Agreement: 1_MTA Agreement for Training.docx(0.01) ...
Final agreement:
Contracting party: Pfizer Inc

Agreement type: Inbound Material Transfer Agreement
Office: Office of Sponsored Research Administration
Responsible Department/Division/Institute: Office of Research Administration - Executive
Description:

Workflow: Pre-Submission → Unassigned → In Review → Signing → Active
Clarification Requested (between Unassigned and In Review, and between In Review and Signing)

There are no Ancillary Reviews to show at this time.

Correspondence: History | Contacts | Snapshots | Documents | Related Projects

Correspondence To Do

Filter by: Due Date [dropdown] [search] + Add Filter X Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
No data to display.						

Correspondence Completed

Filter by: Due Date [dropdown] [search] + Add Filter X Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
----------	-------	------	--------	------------	---------	---------------

Activities

- Manage Relationships
- Submit
- Manage Ancillary Reviews
- Manage Access
- Discard
- Copy Agreement

Actions

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

Actions


Pre-Submission

MTA00001113
Example

Primary contact: Pamela Capman
Manager/PI: Jennifer Tang
Owner:
Created: 1/22/2024 9:03 AM
Received:
Modified: 1/22/2024 12:10 PM
Effective:
Expires:

Agreement: 1_MTA Agreement for Training.docx(0.01) ...
Final agreement:
Contracting party: Pfizer Inc

Agreement type: Inbound Material Transfer Agreement
Office: Office of Sponsored Research Administration
Responsible Department/Division/Institute: Office of Research Administration - Executive
Description:



There are no Ancillary Reviews to show at this time.

Correspondence | History | Contacts | Snapshots | Documents | Related Projects

Correspondence To Do

Filter by ? Due Date Enter text to search + Add Filter Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
No data to display.						

Correspondence Completed

Filter by ? Due Date Enter text to search + Add Filter Clear All

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
----------	-------	------	--------	------------	---------	---------------

Actions:

- Edit Agreement
- Printer Version
- View All Correspondence
- Manage Relationships
- Submit
- Manage Ancillary Reviews
- Manage Access for Managed Access
- Discard
- Copy Agreement

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

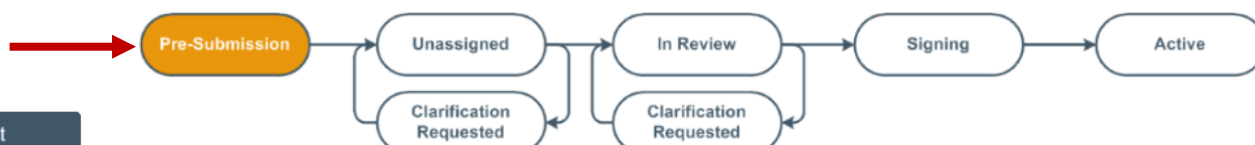
State → **Pre-Submission**

MTA00001113
Example

Primary contact: Pamela Capman
Manager/PI: Jennifer Tang
Owner:
Created: 1/22/2024 9:03 AM
Received:
Modified: 1/22/2024 12:10 PM
Effective:
Expires:

Agreement: 1_MTA Agreement for Training.docx(0.01) ...
Final agreement:
Contracting party: Pfizer Inc

Agreement type: Inbound Material Transfer Agreement
Office: Office of Sponsored Research Administration
Responsible Department/Division/Institute: Office of Research Administration - Executive
Description:



```
graph LR; Pre-Submission --> Unassigned; Unassigned --> In_Review[In Review]; In_Review --> Signing; Signing --> Active; Unassigned --> CR1[Clarification Requested]; CR1 --> Unassigned; In_Review --> CR2[Clarification Requested]; CR2 --> In_Review;
```

Next Steps

- Edit Agreement
- Printer Version
- View All Correspondence
- Manage Relationships
- Submit
- Manage Ancillary Reviews
- Manage Access

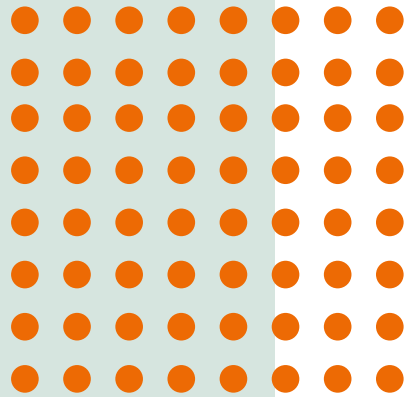
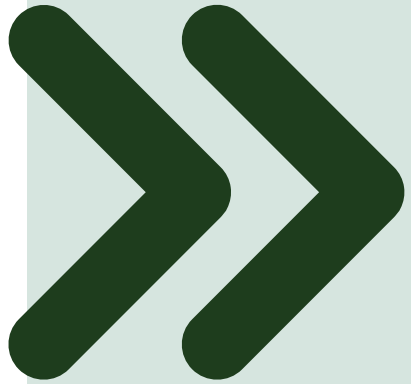
There are no Ancillary Reviews to show at this time.

Correspondence | History | Contacts | Snapshots | Documents | Related Projects

Correspondence To Do

Filter by ? Due Date

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
No data to display.						



The SmartForm

IBISResearch


IBISResearch

You Are Here: 🏠 _ClickAgreement


Agreement Upload

Creating New Agreement

Agreement Upload

1. Agreement manager/Principal investigator:
2. *Agreement creator:
Rebecca Simms (pi)
3. * Upload agreement draft: (or check the box below) 
[None]

Institution to generate first draft?

4. Title or internal reference number: 
5. * Agreement type:
6. Description:

Required field

Help icon

The *SmartForm* is a series of pages you complete with information about the record.

Proposals, Budgets, Awards, Subawards, Award Modification Requests, Award Modifications and Agreements have unique *SmartForms*

A red asterisk (*) next to a question indicates the field is required.

Click the help icon (🔍) for more information about how to answer a question.

Contracting Party & Agreement Collaborators

Validate Compare

Agreement Upload

General Information

You Are Here: Example

Editing: MTA00001113

Go to forms menu Print Help

General Information

1. * Contracting party:
Pfizer Inc

If you cannot find the organization in the list above, enter its information here:
Contracting party name:

2. Contracting party contact name:
Robert James

3. Contracting party contact e-mail:
rjames@pfizer.com

4. Contracting party contact phone:
1231231234

5. * Responsible department/division/institute:
UMMG - Dermatology - MOHS

6. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement)

Name	E-mail	Phone
Nickolas Burry	nab136@miami.edu	+1 (305) 2842282
Veronica Wong	vwx100@miami.edu	+1 (305) 2844295

Exit Save Continue

It is important to fill in the contracting party and agreement collaborator information!

IBISResearch 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 through IBISResearch to University of Miami email addresses
- Otherwise, send through Outlook



Agreement Roles



1. Registered User



2. Study Staff



3. Agreements Reviewer



4. Agreements Manager

Agreement Roles & Responsibilities



1. Registered User

Agreement Creator

Agreement Collaborator

Ancillary Reviewer



3. Agreements Reviewer

Agreement Owner



2. Study Staff

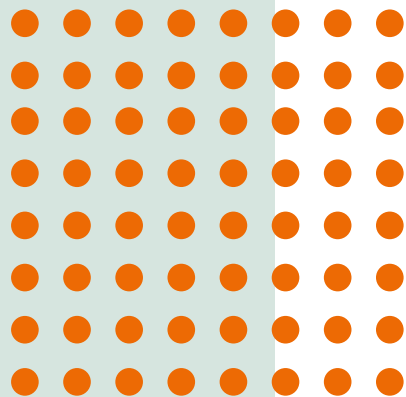
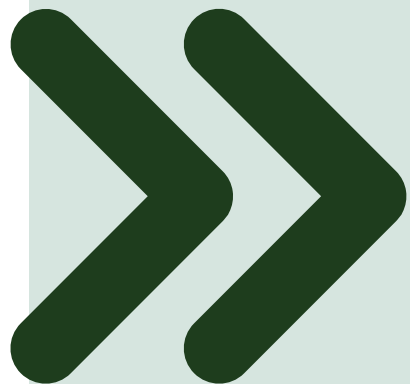
Principal Investigator



4. Agreements Manager

Agreement Owner

Agreement Manager



Understanding ID Numbers

Unique ID

Each agreement type has a unique identifier.

All Agreements Unassigned New In Progress Active Evergreen

Filter by [?] ID + Add Filter

ID	Name	Agreement
MTA00000021	Material Transfer Abbott	
CTA00000053	agreement.docx	agreement.01.docx(0.02)
OTH00000012	Agreement for: Test_Wong,K	Draft(0.01)
MTA00000009AM1	Amendment for Strickland 1	
DUA00000007	DUA 2-15-2020	
MTA00000018	MTA - MVM 2/14/20	Agreement_for_MTA00000018.doc(0.02)
MTA00000020	Agreement for MTA - (MVM)	
SA00000010	Agreement for: testing agreement	
SA00000011	Agreement for: testing agreement	
MA00000006	test-pc-02-14-2020	Ex15_Other Support.pdf(0.01)
OS00000028	OSA Test Scenario CO 2.12.20	Agreement Draft.pdf(0.02)
SA00000008AM1	Amendment for SRA Test Scenario Bilbao 2.12.20 1	Amendment Draft - Copy.pdf(0.01)
MA00000004	MCTA Test Scenario PS 2.12.2020	IbisResearch - General Agreements Test Scenario DRAFT.docx(0.02)

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.

Pre-Award Guidance

1. Go to the ORA website:
<https://ora.miami.edu>
2. Hover over: About ORA
3. From the dropdown menu, click on Pre-Award
4. Click on Contracts
5. Click on Pre-Award Guidance



Below are Pre-Award Guidance documents related to contracting/subcontracting.

[View Pre-Award Guidance Documents >](#)

Pre-Award Guidance

<https://www.ora.miami.edu/about-ora/Pre-Award/contracts/pre-award-guidance/index.html>

[IBIS Submission Guidance-CDA](#)

[IBIS Guidance-Collaboration Agreement](#)

[IBIS Submission Guidance-CTA](#)

[IBIS Submission Guidance-JHS Work Order](#)










[IBIS Submission Guidance-MTA](#)

[IBIS Submission Guidance-OS \(New\)](#)

[IBIS Submission Guidance-OS \(Amend\)](#)

[IBIS Submission Guidance-SA \(New\)](#)

[IBIS Submission Guidance-SA \(Amend\)](#)

	Please follow this guidance document on how to submit a new Confidentiality Agreement to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new Collaboration Agreement to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new Clinical Trial Agreement to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new JHS Work Order to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new Material Trial Agreement to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new Outbound Subcontract to ORA through IBIS.	New
	Please follow this guidance document on how to submit an amendment to an Outbound Subcontract to ORA through IBIS.	New
	Please follow this guidance document on how to submit a new Sponsored Agreement to ORA through IBIS.	New
	Please follow this guidance document on how to submit an amendment to a Sponsored Agreement to ORA through IBIS.	New

Important

- Create the Agreement from the Activities section of the Funding Proposal, **unless there are no funds.**
- If there are no funds, you will create the Agreement from the Agreement tab.
 - We will practice creating an agreement from the Funding Proposal during the Hands-On portion.

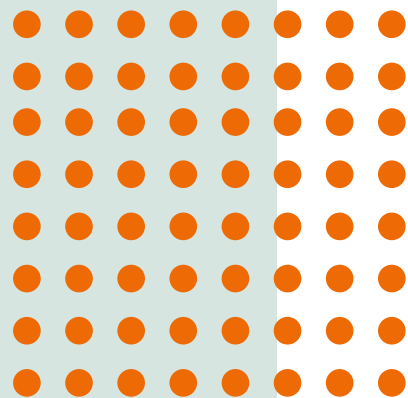
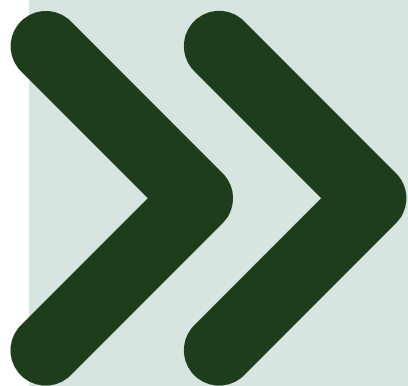
OVPRS Help Desk

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



Questions





Embrace
YOUR
Journey

H ands-On