

IBISResearch

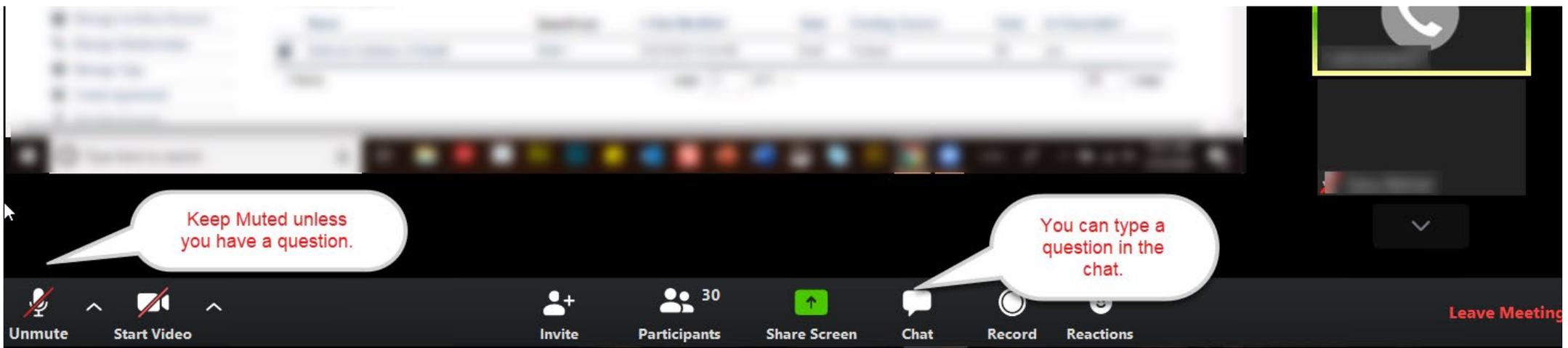
Department Reviewer

Maria Valero-Martinez
Office of Research Administration

UNIVERSITY
OF MIAMI



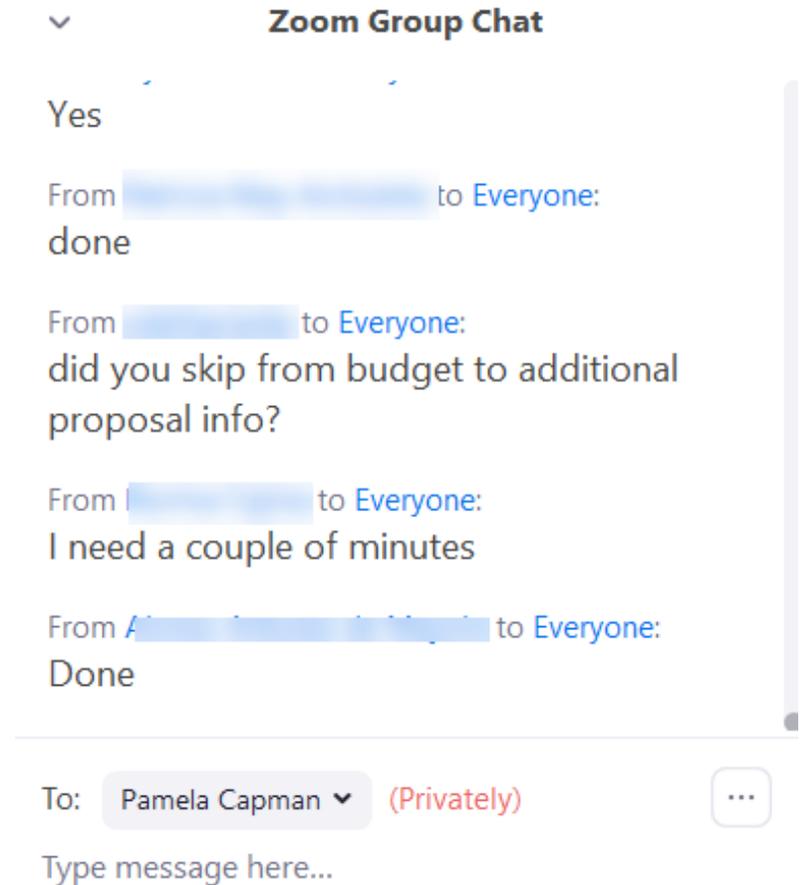
Zoom Controls



Zoom Group Chat

You can use the Zoom Chat Box

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



Introductions

Answer the following questions:

1. What is your name?
2. What department do you work in?



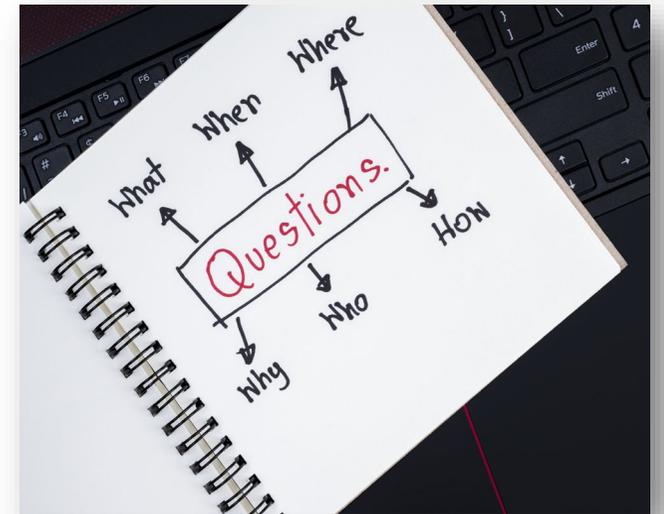
Workshop Etiquette



Silence Phones



Ask For Help



Ask Questions

Learning Objectives

After this session you will be able to...

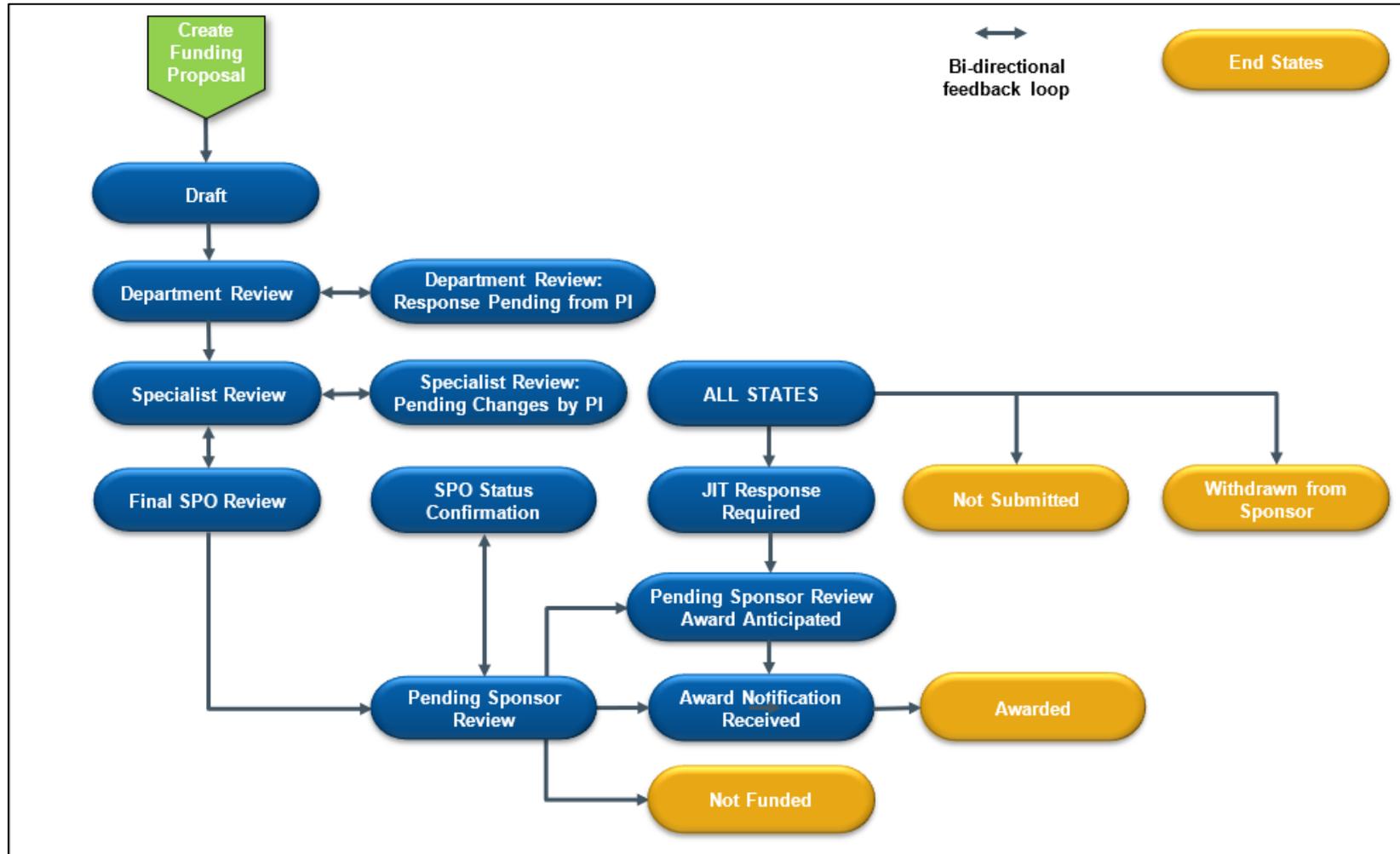
- Demonstrate the new terminology and navigation of IBISResearch
- Review how to find, review, and approve a funding proposal and funded agreement
- Demonstrate how to request clarification from the PI/Study Staff and submit the proposal to ORA for final review and submission to the sponsor





**BIG
JOURNEYS
BEGIN WITH
SMALL
STEPS**

Proposal Workflow



UNIVERSITY
OF MIAMI



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 page from where you can navigate and initiate activities.

The screenshot displays the 'Project Champions (Nov)' workspace. At the top right, there are tabs for 'FP00000002' and 'Funding Proposal'. The main content is divided into two columns: 'Proposal Information' and 'Budget Information'. Below these are navigation 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 contains two rows: 'Spencer Foundation' and 'Cost Sharing for Salary and Equipment'. A sidebar on the left lists various actions like 'View Funding Proposal', 'Printer Version', and 'Add Attachments'. A 'Help' icon is visible in the top right corner.

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

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

- 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

Next Steps

- View Funding Proposal
- Printer Version

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

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

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

10 / page

UNIVERSITY
OF MIAMI



Understanding ID Numbers

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”
- New Awards begin with “IBIS”
- Awards which migrated from Workday begin with “AWD”

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	
FP00000059	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	

UNIVERSITY
OF MIAMI



Navigating the System

Signing In

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



 UNIVERSITY OF MIAMI

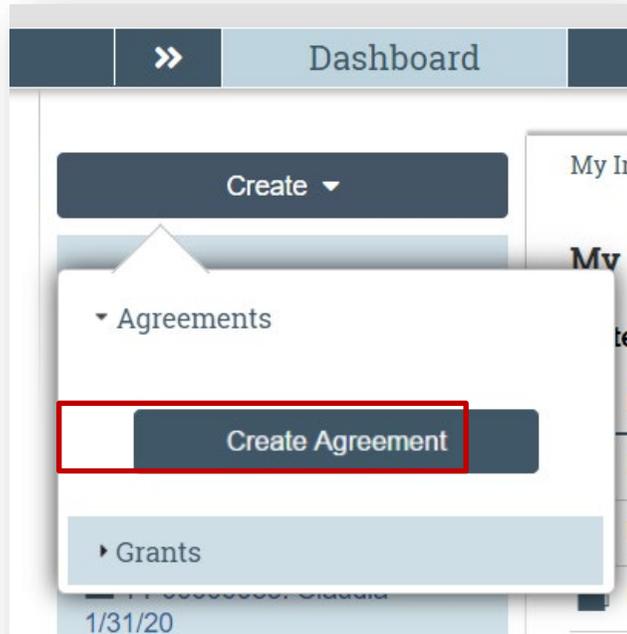
Sign in with your University of Miami credentials
(either primary email address or CaneID):

Forgot your CaneID or password?

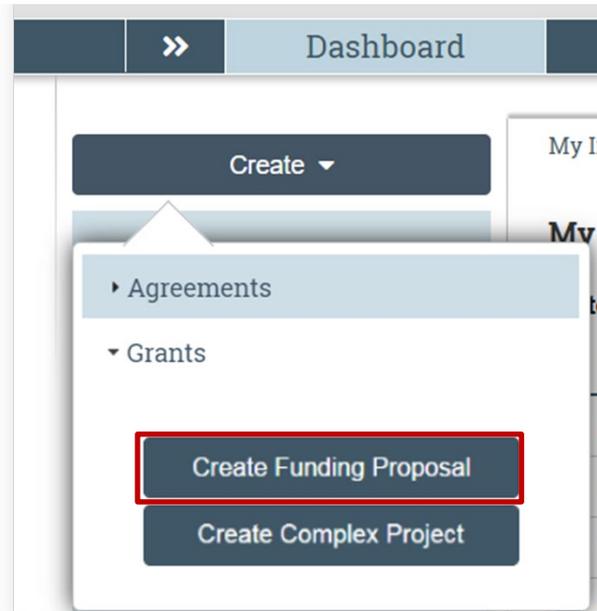
Visit the CaneID Self-Service webpage to manage and/or recover your CaneID or password:
caneidhelp.miami.edu

For technical support, contact the UMIT Service Desk at (305) 284-6565 or help@miami.edu.

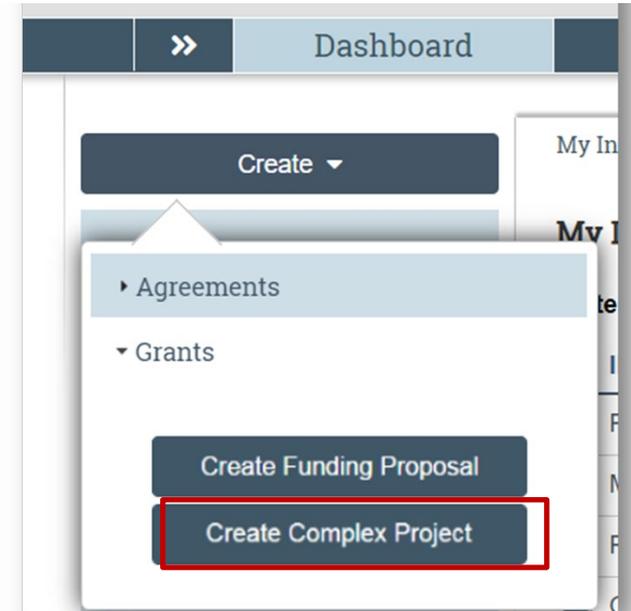
Creating Agreements and Funding Proposals



Create Agreement



Create Funding Proposal



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

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 tabs for 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 tabs for 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 table contains several rows of data, including items like "Jackson Work", "EER 1/15/2020", "Extension of Award", "TEST 01/22/2020 - JLV", "training-proposal-1-15-2020-pc", "Test_1", and "Agreement with Abbott (MVM)".

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	

UNIVERSITY
OF MIAMI



Grants Project Listing Page

Grants Project Listing Page

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

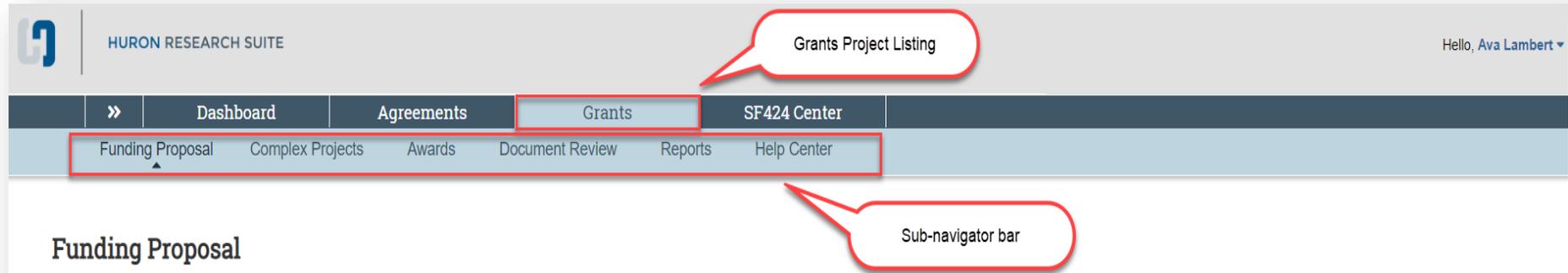
Users have permission to see records (Proposals, awards, and agreements) they are associated with as the following:

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



Grants Project Listing Page

The sub-navigator bar organizes the page into the different project types



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

The screenshot shows the 'Grants Project Listing' page in the Huron Research Suite. The page has a top navigation bar with 'Dashboard', 'Agreements', 'Grants', and 'SF424 Center'. Below this is a sub-navigator bar with 'Funding Proposal', 'Complex Projects', 'Awards', 'Document Review', 'Reports', and 'Help Center'. The 'Funding Proposal' section is active, showing a 'Create Funding Proposal' button and a 'Sub-navigator bar' with tabs for 'Proposals', 'Draft', 'Internal Review', 'Sponsor Review', 'Awarded', and 'Completed'. The 'Proposals' tab is selected, displaying a table of funding proposals. A search filter is visible above the table, and a table with columns for ID, Name, SmartForm, State, PI, and Primary Sponsor is shown below. A callout box labeled 'Tabs' points to the sub-navigator bar.

ID	Name	SmartForm	State	PI	Primary Sponsor
FP00000049	SONIA-1.17.20	[Edit]	Specialist Review	Simms (pi)	National Institutes of Health

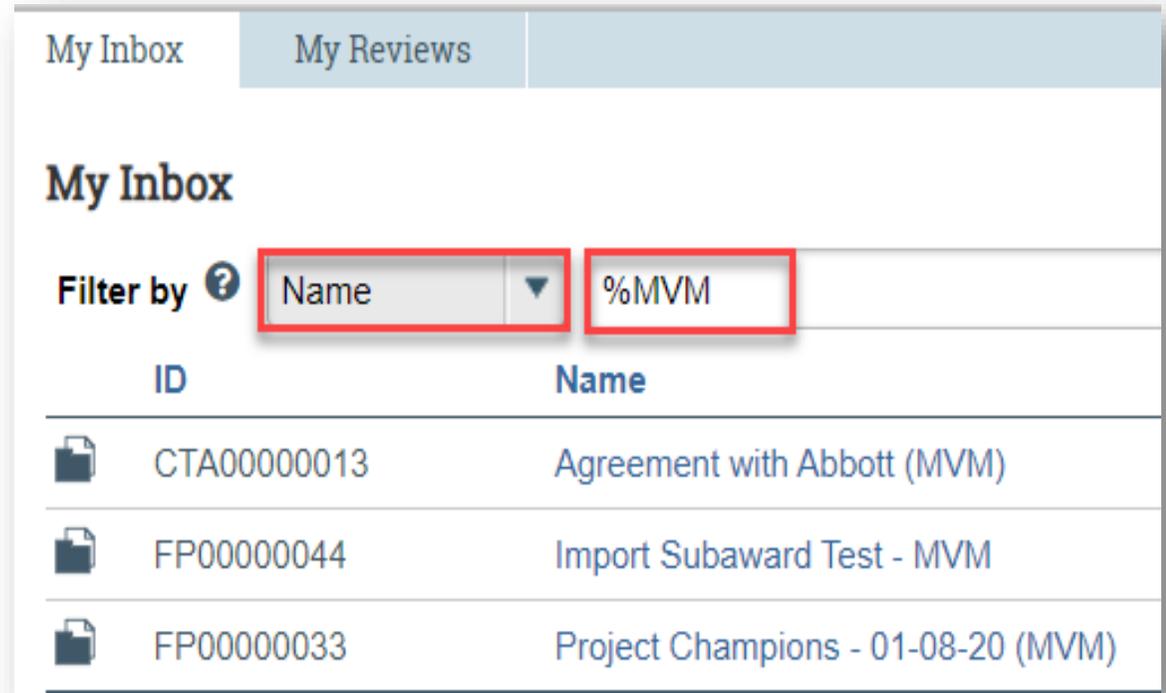
UNIVERSITY
OF MIAMI



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)

UNIVERSITY
OF MIAMI



Workspace

Workspace

- From the Inbox, or Grants Project Listing pages, click on the name of a record to access the project's Workspace
- The Workspace contains
 - Key information, such as State, Title, and ID
 - Various buttons and links to perform Activities

The screenshot displays the workspace for a funding proposal. At the top, navigation tabs include Dashboard, Agreements, Grants, and SF424 Center. A sub-navigation bar shows options like Funding Proposal, State, Awards, Document Review, Reports, and Help Center. The main content area features a 'Draft' status indicator, the title 'Training Test (MVV) - 01/15/2020', and the ID 'FP00000043'. A 'Next Steps' sidebar on the left contains buttons for 'Edit Funding Proposal', 'Printer Version', and 'Create Document Review', along with a list of activities such as 'Submit For Department Review', 'Withdraw Proposal', and 'Manage Ancillary Reviews'. The 'Proposal Information' section lists details for the PI (Savita Pahwa), Department (Microbiology & Immunology), and Sponsors (National Institutes of Health). The 'Budget Information' section shows a starting date of 12/1/2020, 4 periods, and a total budget of \$1,521,625. A 'Working Budgets' table is also present, listing budget items with their respective states and funding sources.

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
Cost Sharing for National Institutes of Health	[Edit]	1/15/2020 3:03 PM	Draft	Institution (Internal)	\$32,962	no
National Institutes of Health	[Edit]	1/15/2020 3:01 PM	Draft	Federal	\$1,521,625	yes

Workspace

- The information displayed on this page is dependent upon the state of the record and the user role
- The tabs displayed on the workspace are specific to the record type (e.g. Proposal, Award, etc.) and contain additional details about the record, including history, reviewers, and attachments

The screenshot displays the SF424 Center workspace for a 'Draft' funding proposal. The page is divided into several sections:

- Navigation:** A top navigation bar includes 'Dashboard', 'Agreements', 'Grants', and 'SF424 Center'. Below it, a secondary bar shows 'Funding Proposal', 'Awards', 'Document Review', 'Reports', and 'Help Center'. A 'Draft' button is highlighted in orange.
- Header:** The title 'Training Test (MVV) - 01/15/2020' is displayed, along with the ID 'FP00000043' and the record type 'Funding Proposal'.
- Next Steps:** A sidebar on the left lists actions such as 'Edit Funding Proposal', 'Printer Version', and 'Create Document Review'.
- Proposal Information:** A table provides details about the proposal, including the PD/PI (Savita Pahwa), Department (Microbiology & Immunology), Specialist (Ava Lambert), Sponsors (National Institutes of Health), and Internal Submission Deadline (5/22/2020).
- Budget Information:** A table shows financial details, including the Starting Date (12/1/2020), Number of Periods (4), Total Direct (\$1,000,000), Total Indirect (\$521,625), and Total (\$1,521,625).
- Working Budgets:** A table lists budget items, such as 'Cost Sharing for National Institutes of Health' and 'National Institutes of Health', with columns for Name, SmartForm, Date Modified, State, Funding Source, Total, and In Financials?
- Activities:** A tab at the bottom of the page is highlighted, indicating the current view.

UNIVERSITY
OF MIAMI



SmartForm

SmartForm

- The *SmartForm* is a series of pages you complete with information about the record.
- Proposals, Budgets, Awards, Subawards, Award Modification Requests, and Award Modifications have unique *SmartForms*

The screenshot shows a web-based form titled 'General Proposal Information' for a 'Training Test (MVV) - 01/15/20...' with ID 'FP00000043'. The form is divided into sections:

- 1. Type of application:** Set to 'New'. A sub-question 'a. Is this award being transferred from another institution?' has radio buttons for 'Yes' and 'No' (selected), with a 'Clear' link.
- 2. * Short title of proposal:** A text input field containing 'Training Test (MVV) - 01/15/2020'. A red callout bubble labeled 'Required field' points to the asterisk.
- 3. * Long title of proposal:** A larger text input field containing 'Training Test (MVV)'.
- 4. * Program director / Principal investigator / Project lead / Fellow:** A dropdown menu showing 'Savita Pahwa' with a help icon (question mark) and a red callout bubble labeled 'Help text'.

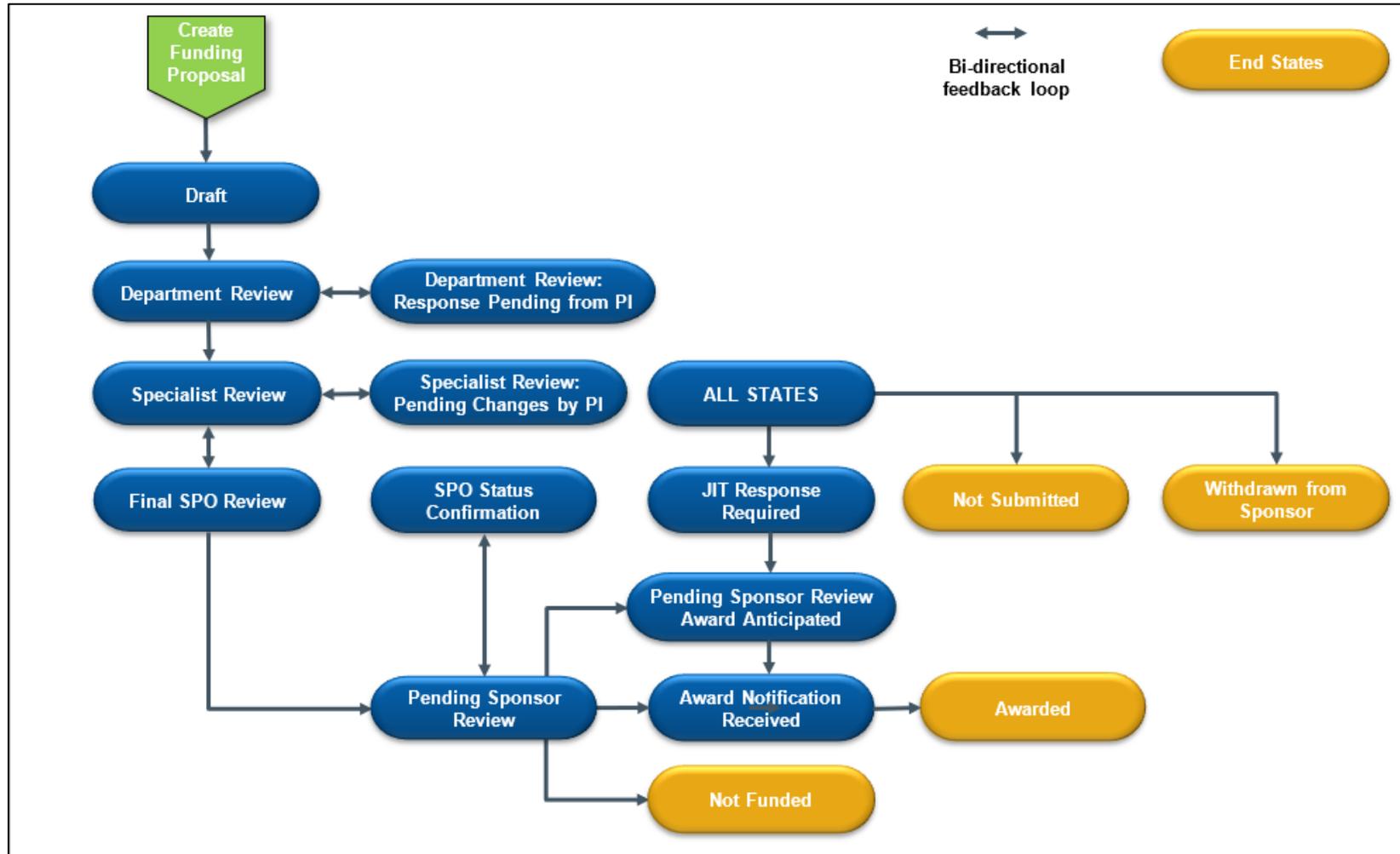
A sidebar on the left lists navigation options: General Proposal Information (highlighted), Personnel, Submission Information, Funding Opportunity Announcement, Budget Periods and Key Dates, IBIS Proposal Information, Compliance Review, Additional Proposal Information, and Completion Instructions. At the top, there are 'Validate' and 'Compare' buttons.

UNIVERSITY
OF MIAMI



Understanding the Workflow

Proposal Workflow



Department Review

Submit For Department Review

Warning: outstanding required ancillary reviews exist for this project

Ancillary Review

Review Type	Person	Organization	Required	Completed	Accepted
Cost Share	Richard Arm (irbch)		yes	no	

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:

OK

Cancel

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



Proposal Email Notifications

Trigger	Sent To
Manage Ancillary Review activity	Assigned Ancillary reviewers
Send Email activity	Recipients selected in the activity
State transition from “Department Review” to “Department Review: Response Pending from PI”	PI, Administrative Contact
State transition from “Final SPO Review” to “Pending Sponsor Review” (with or without a SF424 submission)	PI
State transition to “JIT Response Required”	PI, Administrative Contact
State transition from “Draft” to “Department Review”	Department Reviewers
State transition to “Not Submitted”	PI
State transition from “Specialist Review” to “Specialist Review: Pending changes from PI”	PI, Administrative Contact
State transition from Department Review: Response Pending from PI” to Department Review”	Departmental Reviewers
Award Letter Received activity	Assigned Specialist, proposal editors, proposal readers
Notify SPO of Grant Status activity	Assigned Specialist

UNIVERSITY
OF MIAMI



Reviewing

Notification Email

Grant ID: [FP00000074](#)
PI Name: Rebecca Simms (pi)
Title: Simms_NIH_09.13.19
Sponsor: National Institutes of Health (NIH)

My Inbox



Dashboard

Agreements

Grants

SF424 Center



Help

Create ▾

My Inbox

My Reviews

Recently Viewed

- FP00000374: Lopez 3-6
- BU00002516: National Ins...roke (NINDS)
- FP00000375: CTA
- FP00000094: CTA_budget team
- FP00000362: BeliQ Proposal
- BU00002502: Abbott Laboratories
- FP00000273: lopez 2-29
- FP00000275: Lopez 2-29 pi

My Inbox

Filter by [?] ID + Add Filter × Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
FP00000374	Lopez 3-6	3/6/2020 8:32 AM	3/6/2020 8:50 AM	Department Review	Ava Lambert
FP00000273	lopez 2-29	2/28/2020 8:52 AM	3/5/2020 3:25 PM	Department Review	Ava Lambert
IBIS00000036	Test Scenario 3 for Eva - 02/06/2020	2/11/2020 9:18 AM	3/4/2020 2:33 PM	Transferred Out	Ava Lambert
FP00000357	Short Title WJH	3/4/2020 1:37 PM	3/4/2020 2:06 PM	Department Review	Ava Lambert
FP00000362	BeliQ Proposal	3/4/2020 1:51 PM	3/4/2020 1:57 PM	Department Review	Ava Lambert
FP00000360	Zurama Rodriguez for CTA	3/4/2020 1:38 PM	3/4/2020 1:57 PM	Department Review	Ava Lambert
FP00000359	Project Champions #2- Sheela Dominguez	3/4/2020 1:37 PM	3/4/2020 1:56 PM	Department Review	Ava Lambert
FP00000315	IBIS 3 CDomenig	3/2/2020 2:04 PM	3/2/2020 2:41 PM	Department Review	Ava Lambert
FP00000325	Betsy_CTA_Agreement	3/2/2020 2:14 PM	3/2/2020 2:41 PM	Department Review	Ava Lambert
CTA00000061	Agreement for: IBIS 3 CDomenig	3/2/2020 2:24 PM	3/2/2020 2:40 PM	Pre-Submission	



My Reviews Tab

Create

Recently Viewed

- FP00000374: Lopez 3-6
- BU00002516: National Ins...roke (NINDS)
- FP00000375: CTA
- FP00000094: CTA_budget team
- FP00000362: BeliQ Proposal
- BU00002502: Abbott Laboratories
- FP00000273: lopez 2-29
- FP00000275: Lopez 2-29 pi

My Inbox My Reviews

My Reviews

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

ID	Name	Date Created	Date Modified	State	Coordinator
FP00000273	lopez 2-29	2/28/2020 8:52 AM	3/5/2020 3:25 PM	Department Review	Ava Lambert
FP00000357	Short Title WJH	3/4/2020 1:37 PM	3/4/2020 2:06 PM	Department Review	Ava Lambert
FP00000362	BeliQ Proposal	3/4/2020 1:51 PM	3/4/2020 1:57 PM	Department Review	Ava Lambert
FP00000360	Zurama Rodriguez for CTA	3/4/2020 1:38 PM	3/4/2020 1:57 PM	Department Review	Ava Lambert
FP00000359	Project Champions #2- Sheela Dominguez	3/4/2020 1:37 PM	3/4/2020 1:56 PM	Department Review	Ava Lambert
FP00000315	IBIS 3 CDomenig	3/2/2020 2:04 PM	3/2/2020 2:41 PM	Department Review	Ava Lambert
FP00000325	Betsy_CTA_Agreement	3/2/2020 2:14 PM	3/2/2020 2:41 PM	Department Review	Ava Lambert
FP00000318	Project Champions #2 (Mar 2020) Jada Ramhofer	3/2/2020 2:12 PM	3/2/2020 2:40 PM	Department Review	Ava Lambert
FP00000319	200302-Claudia B. Test	3/2/2020 2:12 PM	3/2/2020 2:39 PM	Department Review	Ava Lambert
FP00000323	Maria R.	3/2/2020 2:13 PM	3/2/2020 2:39 PM	Department Review	Ava Lambert

Review Funding Proposal

Department Review

Next Steps

Review Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

- ✓ Approve
- ↶ Request Changes
- ✗ Disapprove
- ⚙ Manage Tags
- 📎 Add Attachments
- 📄 Copy
- ✉ Send Email
- 💬 Add Comment
- 🗉 Add Private Comment for PI

MVM Train_03_05

FP00000376

Funding Proposal

Proposal Information

PD/PI: Rebecca Simms (pi)
Department: Gastroenterology
Specialist: Ava Lambert
Sponsors: National Institutes of Health (NIH)
Internal Submission Deadline: 5/27/2020
SF424 Link: SF-42400000119

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]	3/6/2020 11:21 AM	Under Review	Federal	\$692,025	yes
Cost Sharing for National Institutes of Health (NIH)	[Edit]	3/6/2020 11:21 AM	Under Review	Institution (Internal)	\$20,000	no

2 items

◀ page 1 of 1 ▶

10 / page

Not Editable

Review Funding Proposal

Research Hello, Emily Faller ▾

Dashboard Agreements Grants SF424 Center

Funding Proposal Complex Projects Awards Document Review Reports Help Center

Department Review **training-proposal-pc-2-20-2020** FP00000191 Funding Proposal

Next Steps

- Review Funding Proposal
- Printer Version
- Create Document Review
- Team Disclosure Status
- Approve
- Request Changes
- Disapprove
- Manage Tags
- Add Attachments
- Copy
- Send Email
- Add Comment
- Add Private Comment for PI

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-42400000076

Budget Information

Starting Date: 1/1/2021
 Number of Periods: 4
 Total Direct: \$940,000
 Total Indirect: \$436,025
 Total: \$1,376,025

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?
Cost Sharing for National Institutes of Health	[Edit]	2/20/2020 10:52 AM	Under Review	Institution (Internal)	\$20,000	no
National Institutes of Health	[Edit]	2/20/2020 10:52 AM	Under Review	Federal	\$1,376,025	yes

2 items page 1 of 1 10 / page

UM: Custom Funding Proposal Workspace



Review Each Section

Compare current state of version:
1.1 Submitted For Department Review
with
1.0 Funding Proposal Created 2/20/2020 7:35:05 AM
No changes found

- General Proposal Information**
- Personnel
- Submission Information
- Funding Opportunity Announcement
- Budget Periods and Key Dates
- IBIS Proposal Information
- Compliance Review
- Additional Proposal Information
- Completion Instructions

General Proposal Information

- 1. **Type of application:**
New
 - a. Is this award being transferred from another institution?
 Yes No
- 2. *** Short title of proposal:**
training-proposal-pc-2-20-2020
- 3. *** Long title of proposal:**
training-proposal-pc-2-20-2020
- 4. *** Program director / Principal investigator / Project lead / Fellow:**
Rebecca Simms (pi)
- 5. *** Select the direct sponsor:**
National Institutes of Health
 - a. If the direct sponsor is not listed, type their name here:
 - b. If this will be a flow-through, select prime sponsor:
- 6. **Instrument type:**
Grant
- 7. *** Select the appropriate F&A rate type:**
Research - Medical
- 8. *** Expected start date:**
1/1/2021

Click on the check box to show that you have reviewed the section

Above section has been reviewed:

Exit



Creating a Note

Compare current state of version:
1.1 Submitted For Department Review
with
1.0 Funding Proposal Created 2/20/2020 7:35:05 AM
No changes found

General Proposal Information

Personnel ✓

Submission Information ✓

Funding Opportunity Announcement ✓

Budget Periods and Key Dates ✓

IBIS Proposal Information ✓

Compliance Review ✓

Additional Proposal Information ✓

Completion Instructions ✓

General Proposal Information

- 1. Type of application:**
New
a. Is this award being transferred from another institution?
 Yes No
- 2. * Short title of proposal:**
training-proposal-pc-2-20-2020
- 3. * Long title of proposal:**
training-proposal-pc-2-20-2020
- 4. * Program director / Principal investigator / Project lead / Fellow:**
Rebecca Simms (pi)
- 5. * Select the direct sponsor:**
National Institutes of Health
a. If the direct sponsor is not listed, type their name here:
b. If this will be a flow-through, select prime sponsor:
- 6. Instrument type:**
Grant
- 7. * Select the appropriate F&A rate type:**
Research - Medical
- 8. * Expected start date:**
1/1/2021

To create a note click on the note icon next to the related section. 

Note with Response Required

The screenshot displays the 'IBIS Proposal Information' interface. A 'Reviewer Notes' dialog box is open, showing a form for adding new reviewer notes. The dialog includes a dropdown menu for 'Department Draft Change Request', a text area for notes, and a 'Response Required' checkbox. A red arrow points to the 'Response Required' checkbox. The background shows the main proposal form with questions about the project's purpose and involvement of human subjects or laboratory animals.

Reviewer Notes

Drop files in the text area to upload

Add New Reviewer Notes

Department Draft Change Request

Open the reviewer notes to send notes about that subject.
If you click on Response Required, a response will be required before the proposal can move forward.
You can attach additional information by clicking on the Attach Files button below.
When finished click OK.

Response Required Attach Files OK

IBIS Proposal Information

1. * What is the primary purpose of this project?
Basic Research

2. * Does this project/activity involve any of the following (check all that apply):
Not applicable

1. * Human subjects involved in this project:
 Yes No

2. * Laboratory animals involved in this project:
 Yes No

Exit

If you click on Response Required, a response will be required before the proposal can move forward.

Highlighted Note

IBIS Proposal Information

Compare current state of version:
1.1 Submitted For Department Review
with
1.0 Funding Proposal Created 2/20/2020 7:35:05 AM
No changes found

- General Proposal Information
- Personnel
- Submission Information
- Funding Opportunity Announcement
- Budget Periods and Key Dates
- IBIS Proposal Information 
- Compliance Review
- Additional Proposal Information
- Completion Instructions

1. * What is the primary purpose of this project?
Basic Research

2. * Does this project/activity involve any of the following (check all that apply): 

3. * In relation to this project/activity (check all that apply):
Not applicable

4. * Does this project include any foreign collaboration including but not limited to persons, entities and/or travel?
 Yes No

5. * Will this project require you to provide any deliverables or materials that would be considered proprietary or restricted (not available to the general public) and/or will you be sending deliverables or materials to a foreign country?
 Yes No

6. * Will this project involve any of the following: research activities in International Waters; create dual use items for military/commercial applications; and/or require the use of select agents and/or toxins identified by the U.S. Government's DURC policy? Yes No

Above section has been reviewed:

Once a note is created, it becomes highlighted

Compliance Review

Track the Review

The screenshot displays a web application interface for tracking proposal reviews. On the left, a sidebar lists various sections: 'General Proposal Information' (highlighted in orange with a green checkmark), 'Personnel', 'Submission Information', 'Funding Opportunity Announcement', 'Budget Periods and Key Dates', 'IBIS Proposal Information', 'Compliance Review', 'Additional Proposal Information', and 'Completion Instructions'. The main content area, titled 'General Proposal Information', has a light green background and contains the following fields:

- 1. **Type of application:** New
- a. Is this award being transferred from another institution? Yes No
- 2. *** Short title of proposal:** training-proposal-pc-2-20-2020
- 3. *** Long title of proposal:** training-proposal-pc-2-20-2020
- 4. *** Program director / Principal investigator / Project lead / Fellow:** Rebecca Simms (pi)
- 5. *** Select the direct sponsor:** National Institutes of Health
 - a. If the direct sponsor is not listed, type their name here:
 - b. If this will be a flow-through, select prime sponsor:
- 6. **Instrument type:** Grant
- 7. *** Select the appropriate F&A rate type:** Research - Medical
- 8. *** Expected start date:** 1/1/2021

At the bottom right of the main content area, there is a green box with the text 'Above section has been reviewed: ' and a dark blue 'Exit' button.

- Once section has been checked for review the screen changes to green
- The checkmark on the left also turns green

Departmental Approval

Department Review

MVM Train_03_05

FP00000376 Funding Proposal

Next Steps

Review Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

✓ Approve

↶ Request Changes

✗ Disapprove

⚙ Manage Tags

📎 Add Attachments

📄 Copy

✉ Send Email

💬 Add Comment

🗉 Add Private Comment for PI

Proposal Information

PD/PI: Rebecca Simms (pi)
Department: Gastroenterology
Specialist: Ava Lambert
Sponsors: National Institutes of Health (NIH)
Internal Submission Deadline: 5/27/2020
SF424 Link: SF-42400000119

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

Do Not Disapprove.
This will wipe out the record

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
National Institutes of Health (NIH)	[Edit]	3/6/2020 11:21 AM	Under Review	Federal	\$692,025	yes
Cost Sharing for National Institutes of Health (NIH)	[Edit]	3/6/2020 11:21 AM	Under Review	Institution (Internal)	\$20,000	no

2 items

page 1 of 1

10 / page

Approve Changes State – Specialist Review

[Help](#)

Specialist Review

training-proposal-pc-2-20-2020

FP00000191 **Funding Proposal**

Next Steps

- [View Funding Proposal](#)
- [Printer Version](#)
- [Create Document Review](#)
- [Team Disclosure Status](#)
- [Manage Tags](#)
- [Add Attachments](#)
- [Copy](#)
- [Send Email](#)
- [Add Comment](#)

URL: Custom Funding Proposal Workspace

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-42400000076

Budget Information

Starting Date:	1/1/2021
Number of Periods:	4
Total Direct:	\$940,000
Total Indirect:	\$436,025
Total:	\$1,376,025

- [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?
 Cost Sharing for National Institutes of Health	[Edit] ▾	2/20/2020 11:22 AM	Under Review	Institution (Internal)	\$20,000	no
 National Institutes of Health	[Edit] ▾	2/20/2020 11:22 AM	Under Review	Federal	\$1,376,025	yes

2 items 1 of 1



UNIVERSITY
OF MIAMI



Reviewing Funded Agreement

Agreement Workflow



Review CTA

MVM Train_03_05

FP00000376

Funding Proposal

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health (NIH)
Internal Submission Deadline:	5/27/2020
SF424 Link:	SF-42400000119

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

...

Related Projects

Filter by  ID  [+ Add Filter](#) [x Clear All](#)

ID	Name	Owner	Organization	Project Type	Project Status	Modified Date
CTA00000056	Agreement for: CTA - MVM (Abbott)		Gastroenterology	Agreement	Pre-Submission	2/29/2020 11:49 AM

1 items

◀ page 1 of 1 ▶

10 / page

Permission

You do not have permission to see the requested page,
or the page does not exist.

- It means you were not added as an Agreement Collaborator on the CTA.
- Contact the PI or individual assisting with the Proposal.

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

Name	E-mail	Phone	
Emily Faller	GRANTS49@hurontest.com	503.123.4654	×

Contact

STAC

Help

Department Review

MVM Train_03_05

FP00000376 Funding Proposal

Next Steps

Review Funding Proposal

Printer Version

Create Document Review

Team Disclosure Status

Approve

Request Changes

Disapprove

Manage Tags

Add Attachments

Copy

Send Email

Add Comment

Add Private Comment for PI

Proposal Information

PD/PI:	Rebecca Simms (pi)
Department:	Gastroenterology
Specialist:	Ava Lambert
Sponsors:	National Institutes of Health (NIH)
Internal Submission Deadline:	5/27/2020
SF424 Link:	SF-42400000119

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
- ...

Contacts

Name	Organization	Phone	Email
Ava Lambert	Sponsored Programs Office	503.123.4664	GRANTS59@hurontest.com
Rebecca Simms (pi)	Gastroenterology	503.123.4722	pi@hurontest.com
Carmen Alverado (coord)	Gastroenterology	503.123.4604	coord@hurontest.com
Mary Brown	Gastroenterology	503.123.4623	GRANTS01@hurontest.com

Reviewers

The following people will review this proposal and provide organizational approval

Current Step: 1



Approve Funding Proposal & Send an Email

Step 1

Department Review

Next Steps

- Review Funding Proposal
- Printer Version
- Create Document Review

Team Disclosure Status

- Approve**
- Request Changes
- Disapprove
- Manage Tags
- Add Attachments
- Copy
- Send Email
- Add Comment
- Add Private Comment for PI

Step 2



Send an Email to the Agreement Creator/PI

Pre-Submission

Created by: Mary Brown
Agreement Manager: Rebecca Simms (pi)

Owner:
Created: 2/29/2020 11:49 AM
Received:
Modified: 2/29/2020 11:49 AM
Effective:
Expires:

Next Steps

- Edit Agreement
- Printer Version
- View All Correspondence
- Submit**
- Manage Ancillary Reviews
- Discard
- Copy Agreement
- Manage Relationships

PI/Creator will submit



Help Desk

- Phone: 305-284-9733
- Email: ORA-SI@miami.edu



Sign up for Training



Home Learning My Team Reports ILT Admin Admin

Hello, Maria. What Do You Want to Learn Today?

ibis



Transform your learning

UNIVERSITY
OF MIAMI



Questions and Answers

