Confidentiality (CDA/NDA) Agreement IBIS Submission Guidance

Prerequisite Checklist:

☐   ORA handles Confidentiality Agreements (CDA's or NDA's) relating to research that UM is conducting/participating in or might conduct/participate in (i) where another party is disclosing its confidential information to UM (inbound disclosure), or (ii) relating to a possible clinical trial.

☐   A WORD version of the Confidentiality Agreement is needed.
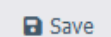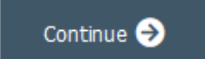
Confidentiality Agreement IBIS Submission Instructions:

1. **Navigate to the Agreements Tab:**   Agreements

2. **Click Create Agreement:**   Create Agreement

3. **Agreement Upload Tab**

1. Agreement manager/Principal investigator:	The Agreement manager/Principal Investigator should be the PI overseeing the overall project
2. * Primary contact: Holly Kasem-Beg	Primary contact automatically populated with the name of the individual submitting the request but can be changed.
3. * Upload agreement draft: (or check the box below) [None] ⬆ Upload	Upload the WORD version of the Agreement here.
4. Title or internal reference number:	Title should be a short unique identifier.
5. * Agreement type: Inbound Non-Disclosure Agreement	Agreement type should always be **Inbound Non-Disclosure Agreement**.
6. Description:	The description box **should describe the purpose of the agreement.**
7. Supporting documents: + Add Name There are no items to display	Typically there are no supporting documents for a Confidentiality Agreement.

4. **Click Continue:**   ⊗ Exit   💾 Save   Continue ➡

5. General Information Tab

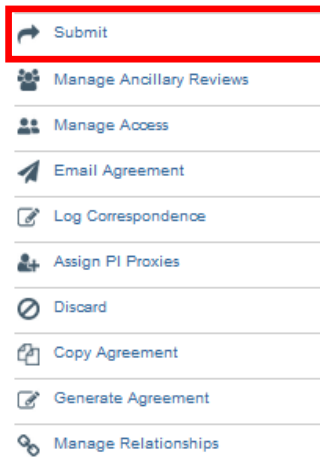|	
1. * Contracting party: If you cannot find the organization in the list above, enter its information here: **Contracting party name:**	This is the other party that the Agreement is with.
2. Contracting party contact name:	This Contact should be an individual employed by the Contracting Party responsible for the negotiation of agreements.
3. Contracting party contact e-mail:	Email address is **required**.
4. Contracting party contact phone:	Optional.
5. * Responsible department/division/institute: ? ORA Administration	Ensure accuracy.
6. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement) Name E-mail Phone There are no items to display	Ensure all individuals who must have read/edit access to the request are added.

6. Non-Disclosure Agreement Information

1. Describe the purpose of the exchange:	Describe the purpose of the exchange of information.

7. Completion Instructions Tab: confirm all information inputted accurately and Click Finish

Exit   Save   Finish

8. The NDA should now be in Pre-Submission status. Click Submit on the leftmost menu:

→ Submit

👥 Manage Ancillary Reviews

👥 Manage Access

✈ Email Agreement

✎ Log Correspondence

👤+ Assign PI Proxies

⊘ Discard

🗐 Copy Agreement

✎ Generate Agreement

🔗 Manage Relationships

Notes: **1) Submission of a Confidentiality Agreement request in IBIS constitutes department and PI approval for Research Administration to review and negotiate the agreement according to UM guidelines, policies and procedures.**

2) Failure to comply with this guidance document may result in rejection/discarding of the Confidentiality Agreement request or a formal Request for Clarification in IBIS.