



## Collaboration Agreements IBIS Submission Guidance

### Prerequisite Checklist:

- If the Collaboration involves funding support from the other party, the Agreement should be submitted as a Sponsored Agreement (SA) and not a Collaboration Agreement.
- The Scope of Work of UM and the Collaboration Institution needs to be finalized before submitting to Research Administration.
- A WORD version of the Collaboration Agreement is needed.

### Collaboration Agreement IBIS Submission Instructions:

1. Navigate to the Agreements Tab: 

2. Click Create Agreement: 

### 3. Agreement Upload Tab

<p><b>1. Agreement manager/Principal investigator:</b></p> <input type="text"/>	<p>The Agreement manager/Principal Investigator should be the PI overseeing the overall project</p>		
<p><b>2. * Primary contact:</b></p> <p>Holly Kasem-Beg <input type="text"/> <input type="button" value="x"/></p>	<p>Primary contact automatically populated with the name of the individual submitting the request but can be changed.</p>		
<p><b>3. * Upload agreement draft:</b> (or check the box below) <input <="" p="" type="button" value="?"/> <p>[None] <input type="button" value="Upload"/></p> <p>First draft to be generated internally? <input checked="" type="checkbox"/></p> </p>	<p>Upload the WORD version of the Agreement here.</p> <p>If the collaborator specifically asks for UM to generate the agreement: mark box as "First draft to be generated internally".</p>		
<p><b>4. Title or internal reference number:</b> <input <="" p="" type="button" value="?"/> <input type="text"/> </p>	<p>Title should be a short unique identifier.</p>		
<p><b>5. * Agreement type:</b></p> <input type="text" value="Other"/>	<p>Agreement type should always be <b>Other</b>.</p>		
<p><b>6. Description:</b></p>	<p>Describe in detail the scope of the collaboration here.</p>		
<p><b>7. Supporting documents:</b></p> <p><input type="button" value="+ Add"/></p> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>There are no items to display</td> </tr> </tbody> </table>	Name	There are no items to display	<p>Provide the scope or work of the collaboration here.</p> <p>UM and the collaborator may have differing scopes of work, if that is the case, please include both.</p>
Name			
There are no items to display			



4. Click Continue:

5. General Information Tab

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

6. Additional Information Tab

<p>1. * Please select the agreement type:</p> <p> <input type="radio"/> Collaboration/Memorandum of Understanding  <input type="radio"/> Teaming Agreement  <input type="radio"/> Interpersonnel Agreement (IPA)  <input type="radio"/> Other  <a href="#">Clear</a> </p>	<p>Mark "Collaboration/Memorandum of Understanding" here for a collaboration agreement.</p>
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7. Intellectual Property Information Tab

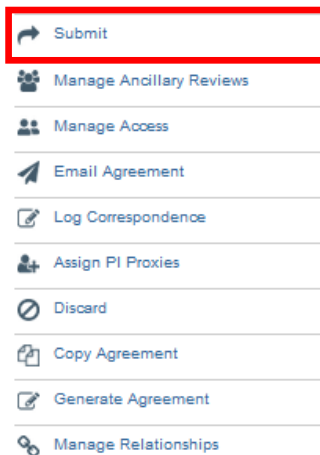
<p>1. * Is this agreement related to a submitted Funding Proposal?</p> <p> <input type="radio"/> Yes <input type="radio"/> No <a href="#">Clear</a> </p>	<p>If marked "No", there will be additional questions that need to be answered as applicable.</p>
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8. **Completion Instructions Tab: confirm all information inputted accurately and Click Finish**



9. **The Collaboration Agreement should now be in Pre-Submission status. Click Submit on the leftmost menu:**



**Notes: 1) Submission of a Collaboration 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 Collaboration Agreement request or a formal Request for Clarification in IBIS.**