




## JHS Work Order (JWO) IBIS Submission Guidance

### Prerequisite Checklist:

- Study must be fully submitted to IRB before submission to ORA.
- Jackson involvement must be outlined in related Funding Proposal (FP) under question 2 in Additional Proposal Information:

#### Additional Proposal Information

2. Select resources required for this proposal:  
Jackson Health System (JHS) Facilities

- a. \* Attach one document explaining all resource requirements:  
 Resource Requirements(0.01)

- Related Funding Proposal (FP) has been Awarded.
- Following Documents need to be filled out and ready to upload:

- Jackson Work Order Request Form (found here: [https://www.ora.miami.edu/assets/pdf/ora-forms/jackson\\_work\\_order\\_request.pdf](https://www.ora.miami.edu/assets/pdf/ora-forms/jackson_work_order_request.pdf))
- JHS CTO Application (found here: <https://jhs.miami.org/jhsofficerresearch/>)
- JHS Study Calendar (as applicable): <https://storage.googleapis.com/jackson-library/clinical-trials/StudyCalendar.xls>

JHS Work Order are automatically managed by ORA for submitted Industry Sponsored Clinical Trials if Jackson involvement is appropriately outlined in the related funding proposal. No need to submit a JHS WO request for submitted Industry Sponsored Clinical Trials.

All other projects will need submission of a JHS WO in IBIS to ORA.

Questions relating to the JHS CTO Application and/or JHS Study Calendar should be submitted to JHS CTO Office [JHS-CTO-Submissions@jhs.miami.org](mailto:JHS-CTO-Submissions@jhs.miami.org)

### JHS Work Order IBIS Submission Instructions:

1. Navigate to the associated FP and click Create Agreement:



Create Agreement

2. Click Create Agreement:

Create Agreement

3. Select Jackson Work Orders from the dropdown:

\*Select an Agreement Type to create:

Jackson Work Orders

4. Navigate to Related Projects tab in the FP, where the new JWO should now be listed. Select the new JWO ID.

5. Click Edit Agreement:

Edit Agreement

6. Agreement Upload Tab

#### 1. Agreement manager/Principal investigator:

The Agreement manager/Principal Investigator should automatically populate based off the FP and should be the PI overseeing the overall project.



<p><b>2. * Primary contact:</b> Holly Kasem-Beg <span>...</span> <span>✕</span></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) <span>?</span> [None] <span>Upload</span></p> <p><b>First draft to be generated internally?</b> <input checked="" type="checkbox"/></p>	<p>Mark box as "First draft to be generated internally".</p>		
<p><b>4. Title or internal reference number:</b> <span>?</span></p> <input type="text"/>	<p>Title should already be included based off the study title of the FP.</p>		
<p><b>5. * Agreement type:</b> Jackson Work Orders <span>▼</span></p>	<p>Agreement type should already be populated at Jackson Work Order.</p>		
<p><b>6. Description:</b></p>	<p>Describe Study here.</p>		
<p><b>7. Supporting documents:</b></p> <p><span>+ Add</span></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>Include the following documents here:</p> <ul style="list-style-type: none"> <li>• Jackson Work Order Request Form</li> <li>• JHS CTO Application</li> <li>• JHS Study Calendar</li> </ul>
Name			
There are no items to display			

7. Click Continue:

✕ Exit

Save

Continue ➔

8. General Information Tab

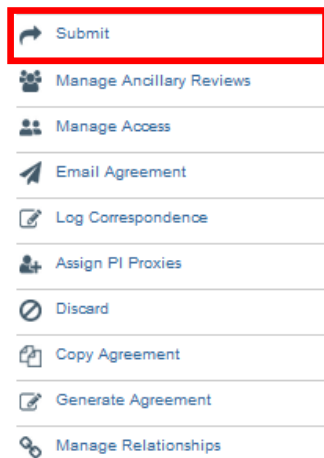


<p><b>1. * Contracting party:</b> Public Health Trust (Pht-Jmh) <input type="text"/> <input type="button" value="..."/> <input type="button" value="✕"/></p>	<p>Insert "Public Health Trust (Pht-Jmh)". [Once you start typing the name it should show this option].</p>						
<p><b>2. Contracting party contact name:</b> <input type="text"/></p>	<p>Not required (ORA has established contacts at JHS).</p>						
<p><b>3. Contracting party contact e-mail:</b> <input type="text"/></p>	<p>Not required.</p>						
<p><b>4. Contracting party contact phone:</b> <input type="text"/></p>	<p>Not required..</p>						
<p><b>5. * Responsible department/division/institute: ?</b> ORA Administration <input type="text"/> <input type="button" value="..."/> <input type="button" value="✕"/></p>	<p>Ensure accuracy.</p>						
<p><b>6. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement)</b> <input type="text"/> <input type="button" value="..."/> <table border="1" data-bbox="277 827 862 873"> <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></p>	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							

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



**10. The JHS Work Order should now be in Pre-Submission status. Click Submit on the leftmost menu:**



**Notes: 1) Submission of JHS Work Order request in IBIS constitutes department and PI approval for Research Administration to develop a JWO and Budget with Jackson Hospital for the applicable project according to UM guidelines, policies and procedures.**



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