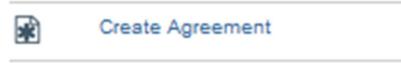## Sponsored Agreement IBIS Submission Guidance

Prerequisite Checklist:

☐ Funding Proposal (FP) in process in IBIS. Note: SA cannot be finalized until the corresponding FP is in Pending Sponsor Review status.

IBIS Submission Instructions:

1. **Navigate to the associated FP and click Create Agreement:** [⊞ Create Agreement]

2. **Click Create Agreement:** [Create Agreement]

3. **Select appropriate Agreement Type from the dropdown:** *Select an Agreement Type to create:* [Sponsored Agreement ▼]

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

5. Click Edit Agreement: [Edit Agreement]

6. 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 populates with the name of the individual submitting the request but can be changed. Primary contact given will be the administrative contact named in the agreement and the individual contacted for all questions related to the request.
3. * Upload agreement draft: (or check the box below) ❓ [None] [⬆ Upload] First draft to be generated internally? ☐	A copy of the draft agreement received from the sponsor and all attachments referenced in the agreement should be uploaded here (please leave Title blank). "First draft to be generated internally?" should only be selected in the event the sponsor has requested that UM produce an initial draft.
4. Title or internal reference number: ❓ [ ]	Title should be in the following format: Agreement_[UM PI Name]_[Sponsor Name]_[Sponsor Award No.(if available)]
5. * Agreement type: [Sponsored Agreement ▼]	Agreement type must be consistent with the agreement being submitted (Sponsored Agreement if a funded agreement; Clinical Trial Agreement for funded clinical trials (in accordance with the corresponding FP); Other for unfunded collaboration agreements, unfunded MOUs, and teaming agreements; etc.).

6. Description:	The description **must lead with any sponsor deadlines for execution, i.e. "SPONSOR DUE DATE: XX"**. This field should also be used to communicate any special instructions to the Contracts Team.
7. Supporting documents: + Add Name There are no items to display	The following documents must be uploaded here: 1. Sponsor email requesting review of the agreement 2. Scope of work, budget, and budget justification for the project (as applicable) 3. Additional documents provided by the sponsor (as applicable)

1. General Information Tab

1. * Contracting party: ... If you cannot find the organization in the list above, enter its information here: **Contracting party name:**	Ensure the Contracting Party is consistent with sponsor identified in the agreement.
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 ... ✖	Automatically populates – change only as needed to 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 only those individuals who must have read/edit access to the request are added.

2. Intellectual Property Information

1. * Is this agreement related to a submitted Funding Proposal? ○ Yes ○ No Clear	Response required.

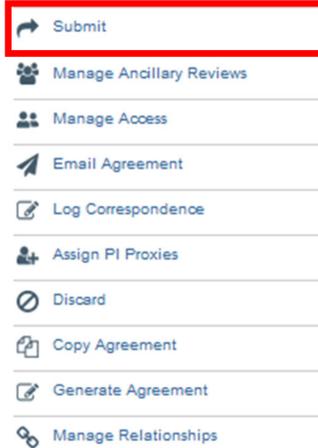## 3. Click Continue: ⊗ Exit   🖫 Save   Continue ➡

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

5. **The record should now be in Pre-Submission status. Click Submit on the leftmost menu:**

Notes: 1) Submission of a request in IBIS constitutes department and PI approval to proceed with execution of the agreement as written (including the content of the scope of work and budget) and in accordance with the information supplied in the IBIS Create Agreement form.

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