



## Sponsored Agreement Amendment IBIS Submission Guidance

### Prerequisite Checklist:

- ☐ Follow-on Funding Proposal (FP) in process in IBIS if amendment is obligating funding not previously proposed.

### IBIS Submission Instructions:

1. Navigate to the original SA record for the agreement requiring an amendment

2. Click Create Amendment on the leftmost toolbar:



Create Amendment

3. Amendment Information Tab:

<p>1. Upload draft amendment file: (or check the box below)</p> <p>[None]  Upload</p> <p>Amendment file draft to be generated internally? <input type="checkbox"/></p>	<p>A copy of the draft amendment received from the sponsor 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 amendment.</p>
<p>2. Supporting documents:</p> <p> Add</p> <p>Name</p> <p>There are no items to display</p>	<p>The following documents must be uploaded here:</p> <ol style="list-style-type: none"> <li>1. Sponsor email requesting review of amendment</li> <li>2. Budget and/or SOW if changing and not attached to amendment</li> <li>3. Any attachments referenced in amendment</li> <li>4. Deobligations Only: Evidence of Post-Award Approval of Final Amount</li> </ol>
<p>3. * Amendment Description:</p>	<p><b>DO NOT DELETE ANYTHING IN CAPS.</b> The Amendment Description <b>must lead with any sponsor deadlines for execution, i.e. "SPONSOR DUE DATE: XX"</b>. This field should also be used to communicate any special instructions to the Contracts Team.</p>

5. Click Continue:

Exit

Save

Continue

6. Agreement Upload Tab:



<b>1. Agreement manager/Principal investigator:</b> <input type="text"/>	Automatically populates. The Agreement manager/Principal Investigator should be the PI overseeing the overall project.
<b>2. Title or internal reference number:</b> <input type="text"/>	Title should be the title for the original agreement, which automatically populates based on the original submission, preceded by the amendment number.
<b>3. * Agreement type:</b> <input type="text" value="Sponsored Agreement"/>	Agreement type should always be Sponsored Agreement.
<b>4. Description:</b>	<b>DO NOT CHANGE.</b>

## 7. General Information Tab:

<b>1. * Contracting party:</b> <input type="text"/> If you cannot find the organization in the list above, enter its information here: Contracting party name: <input type="text"/>	Ensure the Contracting Party is consistent with sponsor identified in the agreement. Note: this field automatically populates based on the original submission but can be updated.
<b>2. Contracting party contact name:</b> <input type="text"/>	This Contact should be an individual employed by the Contracting Party responsible for the negotiation of agreements. Note: this field automatically populates based on the original submission but can be updated.
<b>3. Contracting party contact e-mail:</b> <input type="text"/>	Email address is <b>required</b> . Note: this field automatically populates based on the original submission but can be updated.
<b>4. Contracting party contact phone:</b> <input type="text"/>	Optional. Note: this field automatically populates based on the original submission but can be updated.
<b>5. * Responsible department/division/institute:</b> ORA Administration	Automatically populates based on the original submission but can be updated – change only as needed to ensure accuracy.

## 8. Intellectual Property Information:

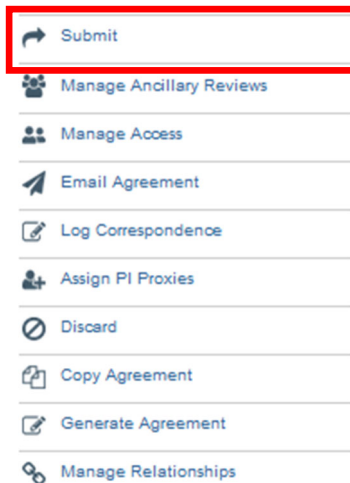
<b>1. * Is this agreement related to a submitted Funding Proposal?</b> <input checked="" type="radio"/> Yes <input type="radio"/> No <a href="#">Clear</a>	Automatically populates based on the original submission and should not be changed.
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9. **Completion Instructions Tab:** confirm all information inputted accurately and Click Finish



10. The SA Amendment should now be in Pre-Submission status. Click Submit on the leftmost menu:



**Notes:** 1) Submission of a Sponsored Agreement Amendment request in IBIS constitutes department and PI approval to proceed with execution of the agreement amendment in accordance with the information supplied in the IBIS Create Amendment form.

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