Zoom Controls

Keep Muted unless you have a question.

You can type a question in the chat.
You can use the Zoom Chat Box

- Type in the message
- Send it to Everyone
- Send it to someone Privately
Answer the following questions:

1. What is your name?
2. What department do you work in?
Workshop Etiquette

- Silence Phones
- Ask For Help
- Ask Questions
After this session you will be able to…

• Demonstrate the new terminology and navigation of IBISResearch

• Review how to find, review, and approve a funding proposal and funded agreement

• Demonstrate how to request clarification from the PI/Study Staff and submit the proposal to ORA for final review and submission to the sponsor
Big journeys begin with small steps.
New Terminology
New Terminology

• Ancillary Review
• Funding Award
• Funding Proposal
• Guest List
• SmartForm
• Specialist
• SPO
• State
• Study Staff
• Tags
**Workspace**: Refers to the page from where you can navigate and initiate activities.
Activities: Refers to the tasks listed on the left side of the screen on the workspace. They are based on security roles.
**Actions:** Refer to the blue buttons found on the left and listed above activities on the workspace. They are based on security roles.
**State**: Refers to the status of the record in the workflow. It gives you a clue about what to do next.
Understanding ID Numbers
Each record contains a unique ID that can be used to identify the type of record.

For example:

- Funding Proposals begin with “FP”
- New Awards begin with “IBIS”
- Awards which migrated from Workday begin with “AWD”
Navigating the System
• The IBISResearch system can be accessed from the ORA website www.ora.Miami.edu
• Click on the IBISResearch link
• Login using your CaneID and password
Creating Agreements and Funding Proposals

Create Agreement

Create Funding Proposal

The University of Miami does not use the Complex Projects page
Dashboard

- My Inbox (to-do list – items that require action from you)
  - Proposals
  - Awards
  - Agreements
  - Budgets
- My Reviews Tab
- Recently Viewed
- Navigate between Agreements and Grants from top navigation bar
Grants Project Listing Page
The Grants Project Listing Page Shows you all the records you have permission to see.

Users have permission to see records (Proposals, awards, and agreements) they are associated with as the following:

- PI
- Project Personnel
- Administrative Personnel
- Guest List editor/viewer
- Ancillary Reviewer
- Specialist in central office
The sub-navigator bar organizes the page into the different project types.
The Funding Proposal and Awards pages contain all proposals and awards you have permission to see. The tabs represent different states throughout the workflow. The first tab contains a list of all records, regardless of the state. Examples: Draft, Internal Review, Specialist Review, Awarded, Completed.
How To Search For Records
1. **Use the Filter by field** to search for a record by various information, such as:
   - ID
   - Name
   - State

2. **Search for key words** – Use the wild card feature by entering a “%” sign before and after the keyword
Workspace
• From the Inbox, or Grants Project Listing pages, click on the name of a record to access the project’s Workspace

• The Workspace contains
  o Key information, such as State, Title, and ID
  o Various buttons and links to perform Activities
The information displayed on this page is dependent upon the state of the record and the user role.
The tabs displayed on the workspace are specific to the record type (e.g. Proposal, Award, etc.) and contain additional details about the record, including history, reviewers, and attachments.
• The *SmartForm* is a series of pages you complete with information about the record.

• Proposals, Budgets, Awards, Subawards, Award Modification Requests, and Award Modifications have unique *SmartForms*
Understanding the Workflow
Proposal Workflow
Warning: outstanding required ancillary reviews exist for this project

Ancillary Review

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Person</th>
<th>Organization</th>
<th>Required</th>
<th>Completed</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Share</td>
<td>Richard Arm (irbch)</td>
<td></td>
<td>yes</td>
<td>no</td>
<td></td>
</tr>
</tbody>
</table>

Endorsements

I will abide by applicable sponsor and Institution regulations in the conduct of the program, including provision of timely reporting per terms of the award. For multi-year awards with automatic renewals (no interim progress reporting required), this form will serve the term of the award.

PRINCIPAL INVESTIGATOR/PROGRAM DIRECTOR ASSURANCE: I certify that the statements herein are true, complete and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. I agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if a grant is awarded as a result of this application.

One of the following options must be selected:

1. As PI/PD for this submission, I approve the above endorsements: ☐

2. As a member of this proposal team, I will obtain the PI/PD’s signature for the endorsements: ☐
• Many activities and state transitions within the workflows trigger email notification
  o Proposals, awards, award modifications, and subawards
• Email notifications will only be sent to University of Miami email addresses
<table>
<thead>
<tr>
<th>Trigger</th>
<th>Sent To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Ancillary Review activity</td>
<td>Assigned Ancillary reviewers</td>
</tr>
<tr>
<td>Send Email activity</td>
<td>Recipients selected in the activity</td>
</tr>
<tr>
<td>State transition from “Department Review”</td>
<td>PI, Administrative Contact</td>
</tr>
<tr>
<td>to “Department Review: Response Pending</td>
<td></td>
</tr>
<tr>
<td>from PI”</td>
<td></td>
</tr>
<tr>
<td>State transition from “Final SPO Review”</td>
<td>PI</td>
</tr>
<tr>
<td>to “Pending Sponsor Review” (with or</td>
<td></td>
</tr>
<tr>
<td>without a SF424 submission)</td>
<td></td>
</tr>
<tr>
<td>State transition to “JIT Response</td>
<td>PI, Administrative Contact</td>
</tr>
<tr>
<td>Required”</td>
<td></td>
</tr>
<tr>
<td>State transition from “Draft” to “Department Review”</td>
<td>Department Reviewers</td>
</tr>
<tr>
<td>State transition to “Not Submitted”</td>
<td>PI</td>
</tr>
<tr>
<td>State transition from “Specialist Review”</td>
<td>PI, Administrative Contact</td>
</tr>
<tr>
<td>to “Specialist Review: Pending changes</td>
<td></td>
</tr>
<tr>
<td>from PI”</td>
<td></td>
</tr>
<tr>
<td>State transition from Department Review:</td>
<td>Departmental Reviewers</td>
</tr>
<tr>
<td>Response Pending from PI” to Department</td>
<td></td>
</tr>
<tr>
<td>Review”</td>
<td></td>
</tr>
<tr>
<td>Award Letter Received activity</td>
<td>Assigned Specialist, proposal editors,</td>
</tr>
<tr>
<td></td>
<td>proposal readers</td>
</tr>
<tr>
<td>Notify SPO of Grant Status activity</td>
<td>Assigned Specialist</td>
</tr>
</tbody>
</table>
Reviewing
Grant ID: FP0000074
PI Name: Rebecca Simms (pi)
Title: Simms_NIH_09.13.19
Sponsor: National Institutes of Health (NIH)
### My Inbox

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date Created</th>
<th>Date Modified</th>
<th>State</th>
<th>Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>FP00000374</td>
<td>Lopez 3-6</td>
<td>3/6/2020 8:32 AM</td>
<td>3/6/2020 8:50 AM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000273</td>
<td>lopez 2-29</td>
<td>2/28/2020 8:52 AM</td>
<td>3/5/2020 3:25 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000315</td>
<td>IBIS 3 CDomenig</td>
<td>3/2/2020 2:04 PM</td>
<td>3/2/2020 2:41 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000325</td>
<td>Betsy_CTA_Agreement</td>
<td>3/2/2020 2:14 PM</td>
<td>3/2/2020 2:41 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>CTA00000061</td>
<td>Agreement for: IBIS 3 CDomenig</td>
<td>3/2/2020 2:24 PM</td>
<td>3/2/2020 2:40 PM</td>
<td>Pre-Submission</td>
<td></td>
</tr>
</tbody>
</table>
### My Reviews Tab

#### My Inbox

**My Reviews**

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Date Created</th>
<th>Date Modified</th>
<th>State</th>
<th>Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>FP00000273</td>
<td>lopez 2-29</td>
<td>2/28/2020 8:52 AM</td>
<td>3/5/2020 3:25 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000315</td>
<td>IBIS 3 CDomenig</td>
<td>3/2/2020 2:04 PM</td>
<td>3/2/2020 2:41 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000325</td>
<td>Betsy_CTA_Agreement</td>
<td>3/2/2020 2:14 PM</td>
<td>3/2/2020 2:41 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000319</td>
<td>200302-Claudia B. Test</td>
<td>3/2/2020 2:12 PM</td>
<td>3/2/2020 2:39 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>FP00000323</td>
<td>Maria R.</td>
<td>3/2/2020 2:13 PM</td>
<td>3/2/2020 2:39 PM</td>
<td>Department Review</td>
<td>Ava Lambert</td>
</tr>
</tbody>
</table>

Hello, Emily Faller ▼
**Review Funding Proposal**

### MVM Train_03_05

**Proposal Information**

<table>
<thead>
<tr>
<th>PD/PI:</th>
<th>Rebecca Simms (pi)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>Gastroenterology</td>
</tr>
<tr>
<td>Specialist:</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>Sponsors:</td>
<td>National Institutes of Health (NIH)</td>
</tr>
<tr>
<td>Internal Submission Deadline:</td>
<td>5/27/2020</td>
</tr>
<tr>
<td>SF424 Link:</td>
<td>SF-42400000119</td>
</tr>
</tbody>
</table>

**Budget Information**

| Starting Date:  | 1/1/2021                   |
| Number of Periods: | 2                         |
| Total Direct:   | $470,000                  |
| Total Indirect: | $222,025                  |
| Total:          | $692,025                  |

**Working Budgets**

<table>
<thead>
<tr>
<th>Name</th>
<th>SmartForm</th>
<th>Date Modified</th>
<th>State</th>
<th>Funding Source</th>
<th>Total</th>
<th>In Financials?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Sharing for National Institutes of Health (NIH)</td>
<td>[Edit]</td>
<td>3/6/2020 11:21 AM</td>
<td>Under Review</td>
<td>Institution (Internal)</td>
<td>$20,000</td>
<td>no</td>
</tr>
</tbody>
</table>

NotEditable
### Review Funding Proposal

**Training Proposal PC-2-20-2020**

**Proposal Information**
- **PI:** Rebecca Simms (pi)
- **Department:** Gastroenterology
- **Specialist:** Ana Lambert
- **Sponsors:** National Institutes of Health
- **Internal Submission Deadline:** 6/2/2020

**Budget Information**
- **Starting Date:** 1/1/2021
- **Number of Periods:** 4
- **Total Direct:** $940,000
- **Total Indirect:** $436,025
- **Total:** $1,376,025

**SF424 Link:** SF42400000076

**Working Budgets**

<table>
<thead>
<tr>
<th>Name</th>
<th>SmartForm</th>
<th>Date Modified</th>
<th>State</th>
<th>Funding Source</th>
<th>Total</th>
<th>In Financials?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Sharing for National Institutes of Health</td>
<td>[Edit]</td>
<td>2/20/2020 10:52 AM</td>
<td>Under Review</td>
<td>Institution (Internal)</td>
<td>$20,000</td>
<td>no</td>
</tr>
<tr>
<td>National Institutes of Health</td>
<td>[Edit]</td>
<td>2/20/2020 10:52 AM</td>
<td>Under Review</td>
<td>Federal</td>
<td>$1,376,025</td>
<td>yes</td>
</tr>
</tbody>
</table>

2 items
Review Each Section

General Proposal Information

1. Type of application: □
   a. Is this award being transferred from another institution? □
      - Yes □ No □

2. * Short title of proposal: □
   - training-proposal-pc-2-20-2020

3. * Long title of proposal: □
   - training-proposal-pc-2-20-2020

4. * Program director / Principal Investigator / Project lead / Fellow: □
   - Rebecca Simms (PI)

5. * Select the direct sponsor: □
   - National Institutes of Health
      a. If the direct sponsor is not listed, type their name here: □
      b. If this will be a flow-through, select prime sponsor: □

6. Instrument type: □
   - Grant

7. * Select the appropriate F&A rate type: □
   - Research - Medical

8. * Expected start date: □
   - 1/1/2021

Click on the check box to show that you have reviewed the section
Creating a Note

To create a note click on the note icon next to the related section.
If you click on Response Required, a response will be required before the proposal can move forward.
Once a note is created, it becomes highlighted.
• Once section has been checked for review the screen changes to green
• The checkmark on the left also turns green
# Departmental Approval

## MVM Train_03_05

### Proposal Information
- **PD/PI:** Rebecca Simms (pi)
- **Department:** Gastroenterology
- **Specialist:** Ava Lambert
- **Sponsors:** National Institutes of Health (NIH)
- **Internal Submission Deadline:** 5/27/2020
- **SF424 Link:** SF-42400000119

### Budget Information
- **Starting Date:** 1/1/2021
- **Number of Periods:** 2
- **Total Direct:** $470,000
- **Total Indirect:** $222,025
- **Total:** $692,025

### SF424 Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>State</th>
<th>Funding Source</th>
<th>Total</th>
<th>In Financials?</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Institutes of Health (NIH)</td>
<td>Under Review</td>
<td>Federal</td>
<td>$692,025</td>
<td>yes</td>
</tr>
<tr>
<td>Cost Sharing for National Institutes of Health (NIH)</td>
<td>Under Review</td>
<td>Institution (Internal)</td>
<td>$20,000</td>
<td>no</td>
</tr>
</tbody>
</table>

---

**Do Not Disapprove. This will wipe out the record**

---
Approve Changes State – Specialist Review
Reviewing Funded Agreement
Agreement Workflow

1. Pre-Submission
2. Unassigned
3. In Review
4. Signing
5. Active

- Clarification Requested

Flow Diagram:

- Pre-Submission to Unassigned
- Unassigned to In Review
- In Review to Signing
- Signing to Active
- Clarification Requested from Unassigned
- Clarification Requested from In Review
## Review CTA

### MVM Train_03_05

#### Proposal Information

<table>
<thead>
<tr>
<th>PD/PI</th>
<th>Rebecca Simms (pi)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Gastroenterology</td>
</tr>
<tr>
<td>Specialist</td>
<td>Ava Lambert</td>
</tr>
<tr>
<td>Sponsors</td>
<td>National Institutes of Health (NIH)</td>
</tr>
<tr>
<td>Internal Submission Deadline</td>
<td>5/27/2020</td>
</tr>
<tr>
<td>SF424 Link</td>
<td>SF-42400000119</td>
</tr>
</tbody>
</table>

#### Budget Information

<table>
<thead>
<tr>
<th>Budget Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting Date</td>
<td>1/1/2021</td>
</tr>
<tr>
<td>Number of Periods</td>
<td>2</td>
</tr>
<tr>
<td>Total Direct</td>
<td>$470,000</td>
</tr>
<tr>
<td>Total Indirect</td>
<td>$222,025</td>
</tr>
<tr>
<td>Total</td>
<td>$692,025</td>
</tr>
</tbody>
</table>

#### Related Projects

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Owner</th>
<th>Organization</th>
<th>Project Type</th>
<th>Project Status</th>
<th>Modified Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTA000000056</td>
<td>Agreement for: CTA - MVM (Abbott)</td>
<td>Gastroenterology</td>
<td>Agreement</td>
<td>Pre-Submission</td>
<td>2/29/2020 11:49 AM</td>
<td></td>
</tr>
</tbody>
</table>

1 items
You do not have permission to see the requested page, or the page does not exist.

- It means you were not added as an Agreement Collaborator on the CTA.
- Contact the PI or individual assisting with the Proposal.

5. **Agreements collaborators:** (Institutional staff given read/edit permissions for this Agreement)

<table>
<thead>
<tr>
<th>Name</th>
<th>E-mail</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Faller</td>
<td><a href="mailto:GRANTS49@hurontest.com">GRANTS49@hurontest.com</a></td>
<td>503.123.4654</td>
</tr>
</tbody>
</table>
# MVM Train_03_05

## Proposal Information

- **PD/PI:** Rebecca Simms (pi)
- **Department:** Gastroenterology
- **Specialist:** Ava Lambert
- **Sponsors:** National Institutes of Health (NIH)
- **Internal Submission Deadline:** 5/27/2020
- **SF424 Link:** SF-42400000119

## Budget Information

- **Starting Date:** 1/1/2021
- **Number of Periods:** 2
- **Total Direct:** $470,000
- **Total Indirect:** $222,025
- **Total:** $692,025

## Contacts

- **Name:**
  - Ava Lambert
  - Rebecca Simms (pi)
  - Carmen Alverado (coord)
  - Mary Brown

- **Organization:**
  - Sponsored Programs Office
  - Gastroenterology

- **Phone:**
  - 503.123.4664
  - 503.123.4722
  - 503.123.4604
  - 503.123.4623

- **Email:**
  - GRANTS59@hurontest.com
  - pi@hurontest.com
  - coord@hurontest.com
  - GRANTS01@hurontest.com

## Reviewers

The following people will review this proposal and provide organizational approval:

- **Current Step:** 1
Approve Funding Proposal & Submit Agreement

Step 1

Department Review

Next Steps
- Review Funding Proposal
- Printer Version
- Create Document Review

- Team Disclosure Status
- Approve
- Request Changes
- Disapprove
- Manage Tags
- Add Attachments
- Copy
- Send Email
- Add Comment
- Add Private Comment for PI

Step 2

Pre-Submission

Created by: Mary Brown
Agreement Manager: Rebecca Simms (pl)
Owner:
Created: 2/29/2020 11:49 AM
Received:
Modified: 2/29/2020 11:49 AM
Effective:
Expires:

Next Steps
- Edit Agreement
- Printer Version
- View All Correspondence
- Submit
- Manage Ancillary Reviews
- Discard
- Copy Agreement
- Manage Relationships
Help Desk

- Phone: 305-284-9733
- Email: ORA-SI@miami.edu
Sign up for Training
Questions and Answers