

Research Administration: A New Opportunity for Grants & Agreement Management



Agreements Best Practices



UNIVERSITY *of* ROCHESTER

Introducing...

IORA INTEGRATED ONLINE RESEARCH ADMINISTRATION

The **IORA** system already contains Click IRB.

Agreements is LIVE and Grants (for all sponsored projects) will go live in January of 2021.

[Website: https://www.rochester.edu/iora-project/grants/](https://www.rochester.edu/iora-project/grants/)



Best Practices

- If you are not the PI, include yourself as collaborator
 - This enables you to receive the email notifications related to this agreement.

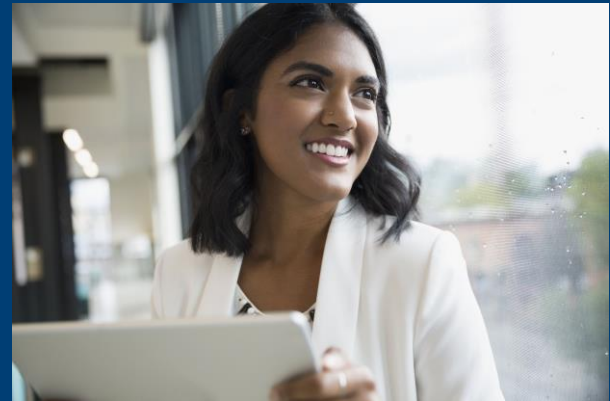
5. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement)

Name	E-mail	Phone
Carl Chemistry	eRANotifications@UR.Rochester.edu	



Best Practices

Provide scientific and administrative contacts



Best Practices



When sending **materials** and
human data, choose

Material Transfer Agreement
(MTA)



Best Practices

Answer as many questions as possible

Agreement Upload

1. Principal investigator:
Brenda Kavanaugh ...

2. *Agreement creator:
Anthony Beckman ...

3. * Upload agreement draft: (or check the box below) ?
[None] Upload

Institution to generate first draft?

4. Project/Study Title: ?
TEST 1

5. * Agreement type:
Data Use Agreement

6. Description:
Brief description of the proposed DUA

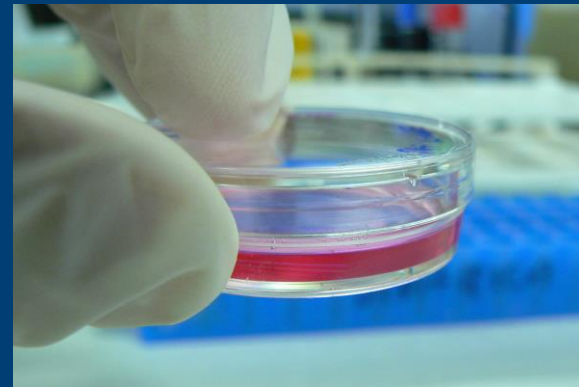


Even if they're not required



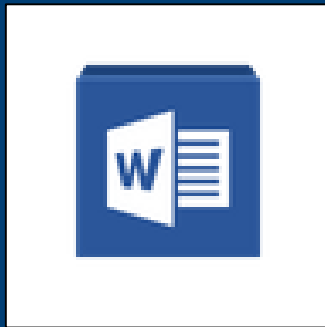
Best Practices

Fully describe end use when sending
anything



Best Practices

Template agreements from counter party need to be in editable **MS Word** format



Best Practices

Be sure to “submit” the Agreement when smartforms are complete

Pre-Submission

Created by: Carl Chemistry
Agreement Manager: Peter Chemistry
Owner:
Created: 7/30/2020 12:17 PM
Received:
Modified: 7/30/2020 12:20 PM
Effective:
Expires:

Next Steps

Edit Agreement

Printer Version

View All Correspondence

Submit

Manage Ancillary Reviews

Discard

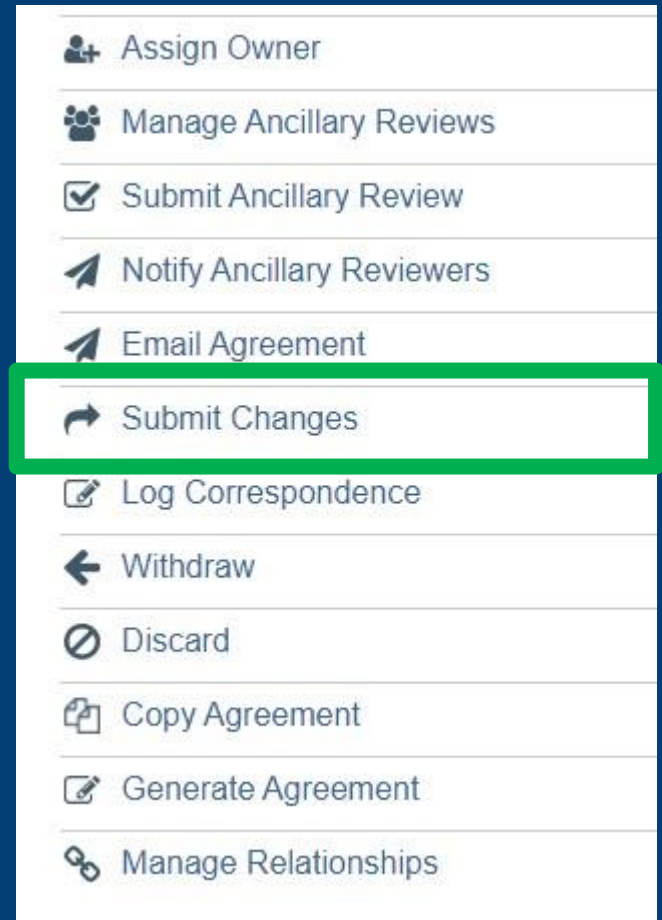
Copy Agreement

Manage Relationships



Best Practices

- To respond to a request for clarification, use the "Submit Changes" activity
- ORPA cannot move the Agreement forward until this is done



Best Practices

To view Requests for Clarification in IORA, look in the "History" tab

The screenshot shows the IORA interface with the 'History' tab selected. The 'Filter by' dropdown is set to 'Activity'. A search bar contains the text 'Enter text to search for'. The table below shows a single entry for 'Clarification Requested' by 'Beckman, Anthony' on '10/19/2020 5:28 PM'. The entry is highlighted with a yellow box.

Activity	Author	Activity Date
← Clarification Requested Please update the RSRB number	Beckman, Anthony	10/19/2020 5:28 PM



Best Practices

- Naming Convention
 - PI Last Name
 - Agreement Type
 - Sponsor/Party
 - Date

Agreement Upload

1. **Principal investigator:**
Peter Chemistry ...

2. ***Agreement creator:**
Anthony Beckman ...

3. *** Upload agreement draft:** (or check the box)
[None] Upload

First draft to be generated internally?

4. **Project/Study Title: ?**
Chemistry_CDA_Merck_10-19-20

5. *** Agreement type:**
Confidentiality Agreement ▼



Best Practices

For Clinical Trial CDAs with a Contract Research Organization (CRO), please list the Party who is listed on the agreement as the contracting party

1. * Select a contracting party:

PRA Health Sciences

List the study sponsor on the Confidential information page

3. Is this Confidentiality Agreement related to an Industry Sponsored Clinical Trial?

Yes No [Clear](#)

a. Please provide the name of the Industry Sponsor/CRO:

Merck & Co., Inc.



Best Practices

When linking an RSRB protocol for human data transfers, please list the “STUDY” protocol, not a “Modification”

Human Data Description

1. Please provide the IRB protocol number (or exemption number) of the study the Data was collected under:

STUDY00005434



Contact Us

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