

# CSM Legal

## IRISS Contract Module Adoption

---

Stephen Harris - Director and Senior legal Counsel

Manjari Shukla – Senior Contract Administrator

October 7 2024

# Objectives

- Understand the reasons for transitioning to IRISS and its enhanced functionalities.
- Understand CSM Legal's agreement classifications and their purpose.
- Learn about common IRISS submission errors and how to avoid them.

# The Sharepoint Era

- Limited Functionality
- Significant Outages
- Zero good integration with Project Finance or other University Software
- Custom Built on a SharePoint Platform that would no longer be supported
- Rebuild or Move to another platform
- Examined other commercial offerings and selected IRISS

# CSM Legal - new IRISS integration

## Key benefits of integrating Agreements with IRISS:

- **Automated Notifications:** Reminders for due dates and approvals.
- Search functionality
- **Visible workflow** diagram and current states
- **Smart Form logic** – you are only presented with questions pertaining to YOUR agreement
- **Automations** with ACC and Human ethics certificates
- **Reporting** capabilities
- **Communication tracking and archiving** – communicate directly in IRISS with CSM Legal

# Clinical Agreement Classifications

Clinical Research Contracts/ Clinical Trial Agreements

Data Transfer Agreement

Confidentiality Agreements

Amendments

Subsites

# Common submission issues

- **Duplicate Submissions:** PI office to verify whether a file is already active before creating
- **Missing Information:** Ensure all fields are complete before submitting , Ensure all relevant documents are attached
- **Incorrect Agreement Type:** Verify Agreement classifications to avoid delays.
- **Timely Submission:** Submit files with deadlines as soon as you can
- **Urgency:** Provide evidence from a third party of actual deadlines and consequences of not meeting them
- **Overhead training:** Any funded agreement will not advance unless the PI has completed this training

# Lets work together

- Please review before submitting and ensure you have clicked submit !!
- Ask for clarifications early. If you are unsure reach out to CSM Legal
- Use the IRISS help guides