



CSM Legal

Tips and Traps

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Objectives



- Learn some tips for navigating CSM legal
- Avoid some common traps
- Learn to be proactive – notify us if a fix can help YOU



The Quick Tips

- Engage AHS at earliest possible opportunity when they will be involved
- HIT **SUBMIT**: The “Finish” Button is a trap
- Provide enough information so we understand your request
- USE the IRISS Guide

Completion Instructions ?

You have reached the end of the Agreement form. Read the next steps carefully:

1. Click **Validate** (top left, found under IRISS logo) to verify that all required questions in this Agreement form are answered.
2. Correct any errors or omissions and refresh the error report.
3. When no errors are reported, click **Finish** to exit the form.
4. From the workspace **Click Submit** to send the Agreement for review.

When submitted you will receive an email confirmation and the state of the agreement will change from Pre-submission to Unassigned.

Agreement Types

- Money for research and recipient has some rights = **Grant**
- Data only flowing = **DTA**
- Materials only flowing = **MTA**
- Money for services and recipient has zero other rights = **Service Agreement**
- Any two of money, data, materials provided, or sponsor dictates matters around the protocol or there are more complex flows = **Research Contract CTA** –
- In IRISS this contract type has the most detail

If not clearly something else pick “**Research Contract**”

See *Resources* for things we do not handle

Clinical / Nonclinical Trap

Largely historical and sometimes has zero bearing on whether a scientist would call a project clinical

All grants are classed as nonclinical. Because the funder sets no requirements on the research (other than things like credit or results reporting) the underlying research is actually irrelevant to the form of a grant agreement.

All incoming data transfers are classified as nonclinical for ease of organization

All NDAs are classified as Clinical

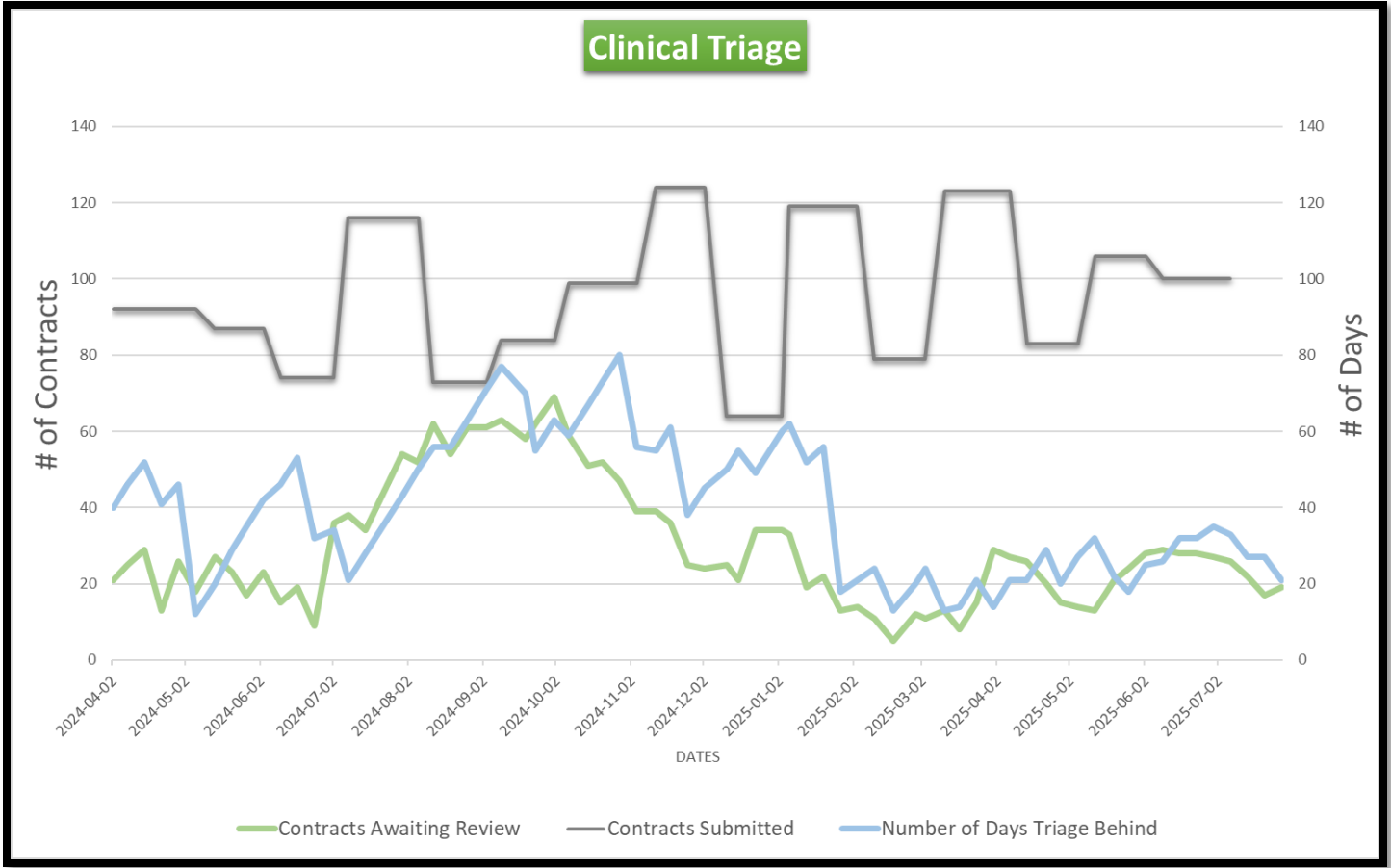
The “Project Description” Trap

- Describe it for lawyers so we understand the goal
- Don't just repeat overview paragraph from protocol (we have that)
- Describe what this one contract is for (we will be requesting an IRISS change on the question)
- Think “*Who What When Where Why*”
- Simple can be better

The Urgent Deadline Trap

- Urgent deadlines are scrutinized heavily
- Only two criteria accepted
- Loss of Funding/opportunity
- Subject care concerns (Research participant care)
- Rapid assessment process sees many things move more quickly - attach prior precedent

The Current Timelines



Resources

CSM Legal Website <https://cumming.ucalgary.ca/research/csm-legal>

The IRISS Guide **>IRISS**

CSM “Directing Documents” – a Quick Reference Guide

Further inquiries csmlegal@ucalgary.ca

On matters already sent for signing csmlegalsigning@ucalgary.ca

Escalate to the manager at Stephen.harris@ucalgary.ca