



Material Transfer Agreement (MTA) IBIS Submission Guidance

Prerequisite Checklist:




- ORA handles MTA's where UM is receiving material from another party (inbound MTA). [NOTE: if the MTA involves the purchasing of materials, it should be submitted to Purchasing as a Purchase Agreement].
- A WORD version of the Material Transfer Agreement is needed.



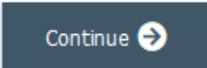
Material Transfer Agreement IBIS Submission Instructions:

1. Navigate to the Agreements Tab: 

2. Click Create Agreement: 

3. Agreement Upload Tab

<p>1. Agreement manager/Principal investigator:</p> <input type="text"/>	<p>The Agreement manager/Principal Investigator should be the PI overseeing the overall project</p>
<p>2. * Primary contact:</p> <p>Holly Kasem-Beg <input type="text"/> </p>	<p>Primary contact automatically populated with the name of the individual submitting the request but can be changed.</p>
<p>3. * Upload agreement draft: (or check the box below) </p> <p>[None] <input type="button" value="Upload"/></p> <p>First draft to be generated internally? <input checked="" type="checkbox"/></p>	<p>Upload the WORD version of the Agreement here.</p> <p>If the MTA is an online submission form (such as Addgene or MMRRC), mark box as "First draft to be generated internally".</p>
<p>4. Title or internal reference number: </p> <input type="text"/>	<p>Title should be a short unique identifier.</p>
<p>5. * Agreement type:</p> <input type="text" value="Inbound Material Transfer Agreement"/>	<p>Agreement type should always be Inbound Material Transfer Agreement.</p>
<p>6. Description:</p>	<p>For online submission MTA requests, if possible, include the <u>hyperlink</u> here to the online document.</p>
<p>7. Supporting documents:</p> <p><input type="button" value="+ Add"/></p> <p>Name</p> <p>There are no items to display</p>	<p>Insert any applicable supporting documents here.</p>

4. Click Continue:   



5. General Information Tab

<p>1. * Contracting party:</p> <input type="text"/> <p>If you cannot find the organization in the list above, enter its information here: Contracting party name:</p> <input type="text"/>	<p>This is the other party that the Agreement is with.</p>						
<p>2. Contracting party contact name:</p> <input type="text"/>	<p>This Contact should be an individual employed by the Contracting Party responsible for the negotiation of agreements.</p>						
<p>3. Contracting party contact e-mail:</p> <input type="text"/>	<p>Email address is required.</p>						
<p>4. Contracting party contact phone:</p> <input type="text"/>	<p>Optional.</p>						
<p>5. * Responsible department/division/institute: ?</p> <p>ORA Administration <input type="text"/> <input type="button" value="x"/></p>	<p>Ensure accuracy.</p>						
<p>6. Agreements collaborators: (institutional staff given read/edit permissions for this Agreement)</p> <input type="text"/> <table border="1"> <thead> <tr> <th>Name</th> <th>E-mail</th> <th>Phone</th> </tr> </thead> <tbody> <tr> <td colspan="3">There are no items to display</td> </tr> </tbody> </table>	Name	E-mail	Phone	There are no items to display			<p>Ensure all individuals who must have read/edit access to the request are added.</p>
Name	E-mail	Phone					
There are no items to display							

6. Material Description Tab

<p>1. * Identify the material:</p> <input type="text"/>	<p>Identify the Material here.</p>
<p>2. * What is the origin of the material?</p> <p><input type="radio"/> Animal</p> <p><input type="radio"/> Plant</p> <p><input type="radio"/> Plasmid</p> <p><input type="radio"/> Human</p> <p><input type="radio"/> Other</p> <p>Clear</p>	<p>Mark all applicable. Certain items marked may require additional information if prompted.</p>



<p>3. * What is the material type? (check all that apply)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Animal, Live <input type="checkbox"/> Animal, Derivative Materials (tissue, organs, bones, etc.) <input type="checkbox"/> Antibody <input type="checkbox"/> Cell line <input type="checkbox"/> cDNA / Plasmid / Vector <input type="checkbox"/> Drug / Compound <input type="checkbox"/> Reagent <input type="checkbox"/> hESC / iPSC <input type="checkbox"/> Human Blood / Tissue <input type="checkbox"/> Other 	<p>Mark all applicable. Certain items marked may require additional information if prompted.</p>
<p>4. Identify any hazardous biological agents involved:</p>	<p>Insert as applicable.</p>

7. Material Use Tab

<p>1. * Provide a concise scientific description of the recipient's use of this material:</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div>	<p>Provide a clear description of the use of the material.</p>
<p>2. * List the quantity of the material to be transferred: (specify units)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>List quantity of material.</p>
<p>3. * Will you be modifying (creating a new substance that contains or incorporates) the material? Yes No Clear</p>	<p>Will you be modifying the material?</p>
<p>4. * Will the material be used with other materials received under another agreement? Yes No Clear</p>	<p>Will the material be used with other materials received under another agreement?</p>
<p>5. * Was there any other agreement, or correspondence with the provider of the other material(s) stating any condition(s), restrictions, or guidelines under which the material(s) will be used? Yes No Clear</p>	<p>Was there any other agreement, or correspondence with the provider of the other materials stating any conditions or restrictions?</p>
<p>6. If these materials are being provided by a Foreign Institution and they are considered a Foreign Component and the funding related to the use of these materials is from the NIH you must obtain prior NIH approval.</p>	<p>Take note of this requirement.</p>
<p>7. * Add any comments that will be helpful in review of this MTA:</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div>	<p>Add any additional comments that might help with review of this MTA.</p>

8. Intellectual Property Information Tab

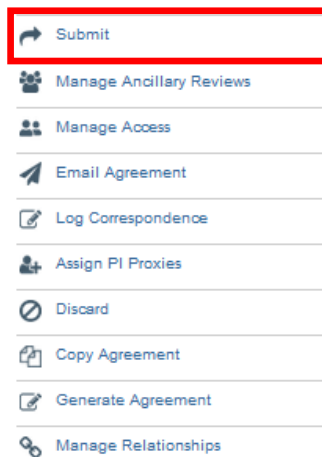
<p>1. * Is this agreement related to a submitted Funding Proposal? <input type="radio"/> Yes <input type="radio"/> No Clear</p>	<p>If marked "No", there will be additional questions that needs to be answered as applicable.</p>
--	--



9. **Completion Instructions Tab: confirm all information inputted accurately and Click Finish**



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



Notes: 1) Submission of a Material Transfer Agreement request in IBIS constitutes department and PI approval for Research Administration to review and negotiate the agreement according to UM guidelines, policies and procedures.

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