



Online MTA/NDA Form Submission Instructions

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OVERVIEW

As of July 1, 2016, delegation of signature authority for Material Transfer Agreements (MTA) and Nondisclosure Agreements (NDA) on the Boulder Campus was transferred from the Technology Transfer Office (TTO) to the Office of Contracts and Grants (OCG).

Over the past year, an online submission was developed to aid OCG in processing these agreements. In March 2017, the online submission platform went live. The purpose of this document is to support a user in using this online platform. For specific information regarding MTA or NDA processes, please refer to [Types of Agreements](#) on OCG's website.

FORM TYPES

Non-Disclosure Agreements

Allows one party to share confidential information with the other party. The NDA specifies how the receiving party/parties will protect and use the confidential information.

NDA's are sometimes referred to as nondisclosure, proprietary information, or secrecy agreements, emphasizing the recipient's handling of the confidential information.

Inbound Materials Transfer Agreement

Allows university researchers to obtain tangible research materials **FROM** outside entities. The MTA defines the rights of the provider and the recipient with respect to the materials and any derivatives.


Outbound Materials Transfer Agreement

Allows university researchers to provide research materials **TO** an outside institution while protecting the University of Colorado's Intellectual Property rights in the research material.



STEP 1: SELECT THE FORM

1. Go to the MTA/NDA online form submission page at <https://content.cu.edu/bocg>.
2. Click the blue link for the desired agreement.



Office of Contracts and Grants
UNIVERSITY OF COLORADO BOULDER

NDA and MTA Submission Form

As of July 1, 2016, delegation of signature authority for Material Transfer Agreements (MTA) and Nondisclosure Agreements (NDA) on the Boulder Campus was transferred from the Technology Transfer Office (TTO) to the Office of Contracts and Grants (OCG).

OCG will oversee the various stages of contract negotiation and execution of MTAs and NDAs. OCG will work with TTO, University Counsel, and other campus offices to address potential concerns and to ensure that the terms of the agreement aligns with the goals of the researchers and the University.

Please select the type of agreement you want to submit.
(Recommended browsers: Firefox or Chrome.)

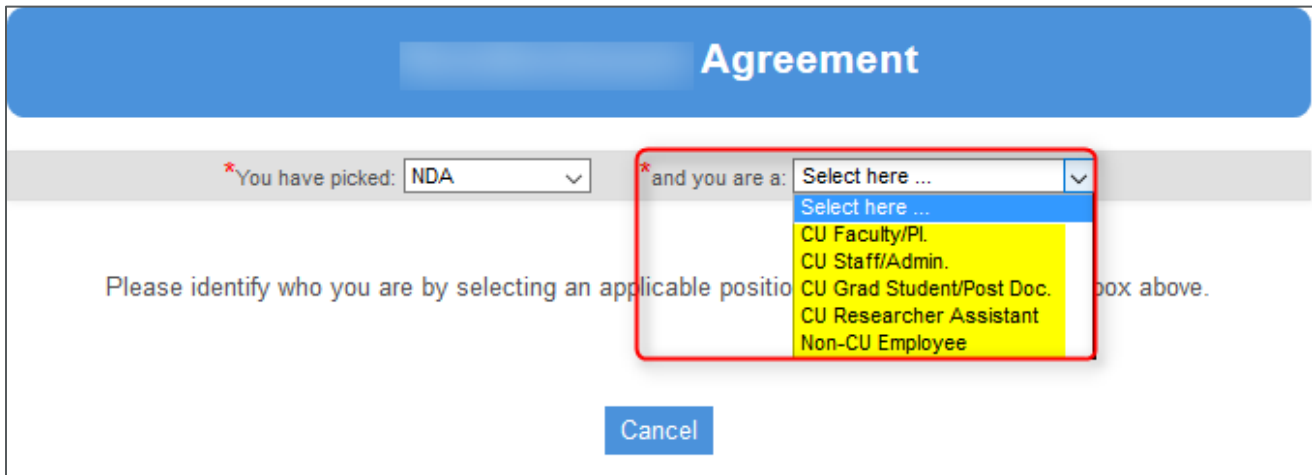
Nondisclosure Agreement - Allows one party to share confidential information with the other party. The NDA specifies how the receiving party/parties will protect and use the confidential information. NDAs are sometimes referred to as nondisclosure, proprietary information, or secrecy agreements, emphasizing the recipient's handling of the confidential information.

Inbound Materials Transfer Agreement - An agreement which allows university researchers to obtain tangible research materials from outside entities. The MTA defines the rights of the provider and the recipient with respect to the materials and any derivatives.

Outbound Materials Transfer Agreement - An agreement which allows university researchers to provide research materials to an outside institution while still protecting the University of Colorado's Intellectual Property rights in the research material.

Office of Contracts and Grants
3100 Marine Street, 572 UCB, Boulder CO 80309
Contact ocgcontracts@colorado.edu for general inquiries.
Contact Nathan.Chen@colorado.edu for technical issues with the website.

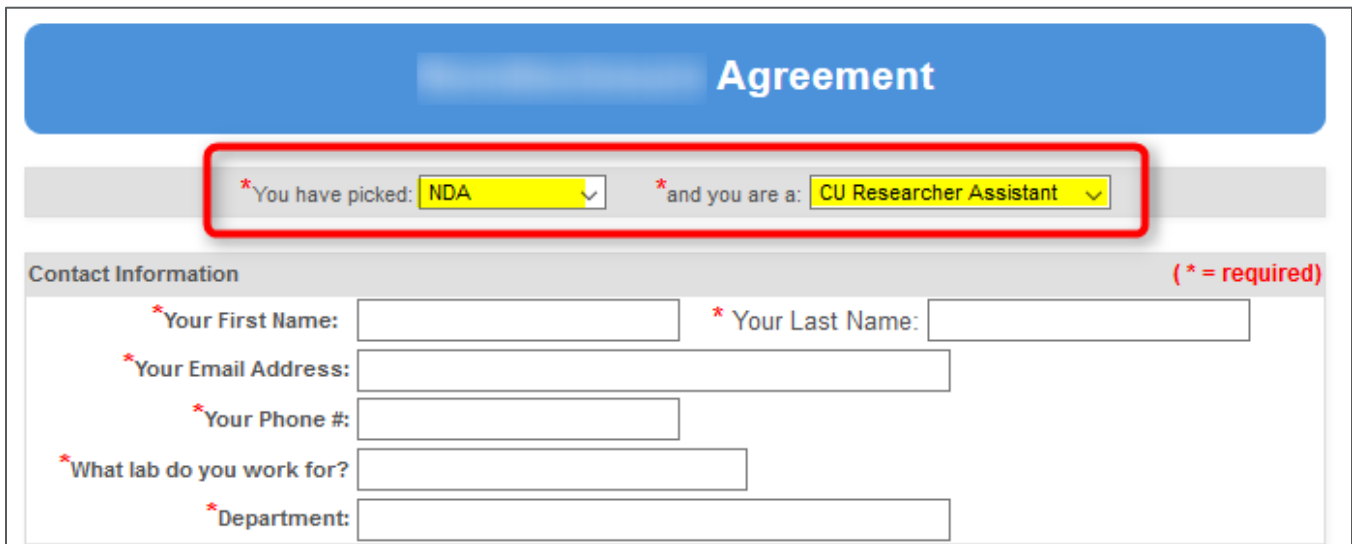
STEP 2: SELECT YOUR ROLE



The screenshot shows the top portion of a web form titled "Agreement". At the top, there is a blue header bar with the word "Agreement" in white. Below this, there are two dropdown menus. The first is labeled "*You have picked:" and has "NDA" selected. The second is labeled "*and you are a:" and has a dropdown menu open showing several options: "Select here ...", "Select here ...", "CU Faculty/PI.", "CU Staff/Admin.", "CU Grad Student/Post Doc.", "CU Researcher Assistant", and "Non-CU Employee". The "CU Researcher Assistant" option is highlighted in yellow. Below the dropdowns, there is a text prompt: "Please identify who you are by selecting an applicable position from the dropdown box above." At the bottom of this section, there is a blue "Cancel" button.

The system is designed to prompt the user with questions based on their role.

NOTE: Even after the form opens, you can change the form and/or role. However, selecting a new form clears any data already entered; it will not transfer over to the new form.



The screenshot shows the "Agreement" form with the "Contact Information" section. The top header bar is blue with "Agreement" in white. Below it, two dropdown menus are highlighted with a red box: "*You have picked:" with "NDA" selected, and "*and you are a:" with "CU Researcher Assistant" selected. Below these is a section titled "Contact Information" with a red note "(* = required)". The form contains five input fields, each with a red asterisk indicating it is required: "*Your First Name:", "*Your Last Name:", "*Your Email Address:", "*Your Phone #:", and "*Department:". The field for "*What lab do you work for?" is also present but does not have a red asterisk.



STEP 3: ANSWER THE QUESTIONS

Contact Information (* = required)

*Your First Name: *Your Last Name:

*Your Email Address:

*Your Phone #:

*What lab do you work for?

*Department:

Agreement Information (* = required.)

*Other Party Name:

*Other Party Type: Commercial/Industry Non-Profit/Academic Other

*Other Party Technical Contact: Name: Email:

Other Party Contract Contact: Name: Email:

*Party Disclosing Confidential Info: CU Other Party Both

Anticipated Start Date for Discussion: (Use mm/dd/yyyy)

Purpose of NDA Discussions: Check all that apply

- To discuss a possible business and technical relationship
- To write a joint grant proposal
- To gain access to proprietary data for research
- Other

* Description of CU Confidential Info: (600 characters maximum)

Will any material be transferred under this agreement? Yes No

Is this agreement related to any invention disclosed to TTO or elsewhere? Yes No

List CU personnel involved in this discussion:

Additional Comments: (600 characters maximum)

Documents to attach (if any) Click "Add Docs" button and then "Browse" button to attach one or multiple documents.

All fields marked with an asterisk * require an answer.

Attach Documentation

Provide supplemental documentation as needed by click on the **Add Docs** button at the bottom of the form. (Click the button again to attach additional files.)

Documents to attach (if any) Click "Add Docs" button and then "Browse" button to attach one or mutiple documents.

Browse...
No file selected.
Remove

Add Docs

STEP 4: REVIEW (GO BACK AND EDIT, IF NEEDED)

Contact Information
You identified yourself as: Researcher Assistant
Your Name: a a
Your Email: a@a.com
Your Phone: 333
What lab do you work for? a
Department: a
Agreement Information - Nondisclosure Agreement
Other Party Name: a
Other Party Type: Commercial/Industry
Other Party Technical Contact: a Email: a@a.com
Other Party Legal Contact: Email:
Party Disclosing Confidential Info: CU
Anticipated Start Date for Discusison:
Purpose of CDA/Discussions:
Description of CU Confidential Info: a
Will any material be transferred under this No agreement?
Is this agreement related to any invention No disclosed to TTO or elsewhere?
List any other CU personnel involved in this discussion:
Additional Comments:
Documents you attached: No documents were uploaded.

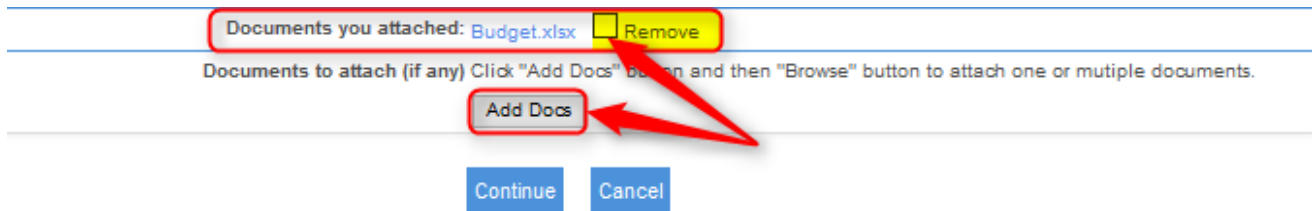
Submit and Finish

Go Back and Edit

Cancel

Edit Attachments

1. To remove or add additional files, select **Go Back and Edit**.
2. Scroll down to the attachments section.
 - a. To REMOVE, check the box of the corresponding file.
 - b. To ADD, click **Add Docs**.



Documents you attached: [Budget.xlsx](#) Remove

Documents to attach (if any) Click "Add Docs" button and then "Browse" button to attach one or multiple documents.

Add Docs

Continue Cancel

3. Click **Continue**.

STEP 5: SUBMIT AND FINISH