

## FOR REFERENCE

Checklist for Materials Out (animal transfer)	Checklist for Materials Out (non-animal transfer)
<input type="checkbox"/> Contact Office of Animal Resources for necessary forms when you first contact Innovation to initiate an MTA.	<input type="checkbox"/> If collaborating with Providing PI, contact Office of Research Administration to verify if a collaboration agreement is needed.
<input type="checkbox"/> If collaborating with Providing PI, contact Office of Research Administration to verify if a collaboration agreement is needed.	<input type="checkbox"/> Please provide a copy of the publication regarding the creation of the material to be provided. If no publication is available, please send written confirmation to Innovation that material was first created at TJU.
<input type="checkbox"/> Please provide a copy of the publication regarding the creation of the material to be provided. If no publication is available, please send written confirmation to Innovation that material was first created at TJU.	<input type="checkbox"/> If material has, or may have, biohazardous properties, contact biosafety office to authorize transfer.

---

### MTA Standard Operating Procedure

1. Innovation will docket a MTA case under PI's name and initiate the review process once it receives a completed and signed MTA Questionnaire from the PI.
2. Once Innovation receives the partially executed MTA from the other party, Innovation will forward it to the PI for signatures. If other institution requests that Innovation initiate signing, Innovation will ask PI to sign the MTA and return it to Innovation.
3. Innovation will email the PI the fully executed MTA in PDF format for his/her records.

**\*For more information regarding MTAs, please go to Innovation's website:**

<http://innovation.jefferson.edu/innovators/processes/material-transfer.html>

**MTA contact:**

Bob DeHaven

Email: [robert.dehaven@jefferson.edu](mailto:robert.dehaven@jefferson.edu)

Innovation Management

Thomas Jefferson University

901 Walnut Street, 11<sup>th</sup> floor, Philadelphia, PA 19107

Phone: 215-955-6073

**TJU MTA Questionnaire (Materials Out)**  
**THIS IS NOT A MATERIAL TRANSFER AGREEMENT**

By responding to the questionnaire below, I hereby certify that I have read and understand the questionnaire, have responded accurately and completely thereto, and that for the duration of the applicable Material Transfer Agreement, I will fully comply with the terms and conditions as indicated by my responses to the attached questionnaire.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

TJU PI's name:	
Recipient Company/Institution's name: Contact information:	
Recipient PI's name: Department: Email:	

(1)	Please list the full name of each material that you are providing. Please also indicate available quantities if possible.	
(2)	Was the first creation of the outgoing material at TJU by you/your lab? If no, please provide the name of the institution where the outgoing material was first created. <b>*Please email to OTT a copy of the publication regarding the first creation of the material, if any.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No If no, name of institution: _____
(3)	Were any materials from other (third-party) company(ies) or institution(s) used to generate the outgoing material? Are you aware if the third-party material is licensed to a for-profit company?	<input type="checkbox"/> Yes <input type="checkbox"/> No  <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, name of company: _____
(4)	Was the project in which the outgoing material was created funded by NIH? If yes, please provide the grant number and title. If no, please specify the name of the funding source (e.g. TJU departmental funding, commercial sponsors).	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, grant number & title : _____  If no, name of funding source: _____
(5)	Are you aware of any patent rights claiming the outgoing materials?	<input type="checkbox"/> Yes <input type="checkbox"/> No
(6)	(a) Should a fee be charged for transfer of the material(s)? <b>FYI: To recoup preparation &amp; maintenance costs, you may consider charging a fee for the transfer (e.g. for the academic request of: (i) mice: \$500-\$2,000/breeding pair; (ii) plasmid (\$200-1,000) (S/H charged separately)). Such fee will be distributed based on TJU Patent Policy.</b>  (b) Should shipping fees be charged to the Recipient Scientist?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, amount to be charged: \$ _____  <input type="checkbox"/> Yes <input type="checkbox"/> No
(7)	Are you collaborating with the Recipient Scientist (i.e. sharing the idea and data and working on the same research project using the material(s))? If yes, please also contact Office of Research Administration to determine whether a Collaboration Agreement Is needed.	<input type="checkbox"/> Yes <input type="checkbox"/> No

**I DO NOT want to see and pre-approve the Recipient Scientist's research plan.**  
 \* If this box is checked, our office will not request the Recipient Scientist's research plan to be included in the MTA.

**I DO NOT want to be copied on emails to the other party.**

I acknowledge that I have reviewed the linked information regarding Environmental Health and Safety Office and Institutional Biosafety Committee rules and guidelines (<http://www.jefferson.edu/osa/ibc/guidelines.cfm>, [www.cdc.gov/od/ohs/biosfty/shipdir.htm](http://www.cdc.gov/od/ohs/biosfty/shipdir.htm)). Based on my review of the information, I have concluded that the transfer of materials from my lab does not \_\_\_\_\_ or does \_\_\_\_\_ require authorization by the Biosafety Officer.

Providing PI signature \_\_\_\_\_ Date \_\_\_\_\_