

INVENTOR PORTAL NDA AGREEMENT REQUEST AND SUBMISSION INSTRUCTIONS

1. In order to request an agreement through the Inventor Portal please click “Request an Agreement” on the left-hand side of the page.
2. The “Agreement Title,” should be the name of the third party(ies) and the faculty member associated with the Request’s last name.
3. You will need to select “Non-Disclosure Agreement- NDA” as the “Type of Agreement.”
4. Before proceeding with the “Submission” portion of the Request, you will need to select or enter the name of each third party involved using the “Other Parties” search tool. To do so, you will use the box next to “Find Company by name” to search for each third party. You will either be able to select the third party’s name from search options, or receive the following notice:

“No results found. **Add a new Company** if you cannot find the Company you are looking for.”

In this case, you should click “Add a new Company” to enter the third party information. This will require the third party’s: a) Company Name, b) Company Address Type (Commercial, Business, or Residential), and c) Company Address (including street, City, State, Postal code, and Country). You can leave the checkbox next to “Set as default Address,” and hit “Save Changes.”

Please repeat this process for each third party to be added. If more than one third party is involved, please list the additional third party Contact information in the “Please specify any special circumstances or other comments, information, or concerns that JHTV should be aware of prior to facilitating this NDA” box at the end of the “Submission” section.

5. If at any time during the completion of the Agreement Request you need to pause your work, you can scroll to the bottom of the page and click “Save As Draft.” This will allow you to save the Request and return to it later. Draft Requests can be found by sorting for “Initiated” agreements in the “Agreements” section of the Inventor Portal.
6. After adding each third party, you will complete each question and/or prompt in the “Submission” section.
7. The “Documents” section can be used to attach any relevant documents or documentation to the Request. In order to add a Document, you will need to select “Browse” and find the document on your computer and hit “Open.” You will need then need to select “Upload Document.” This process will need to be completed for each document you would like to attach to the Request.
8. Once you have completed the “Submission” section, you will need to submit the Request for review by clicking “Submit for Review.” You will receive an email confirming your Submission along with a link to where you can check on the Agreement’s processing status.
9. The Portal Statuses you will see have the following meanings:

STATUS FOR PORTAL USER	MEANING OF STATUS	OVERALL STATUS
Draft	Submission is being worked on by Portal User but has not been submitted	Initiated
Initiated	Submission has been received but has not been approved by a JHTV Portal Administrator	Submitted
Initiated	Submission has been approved by a JHTV Portal Administrator and is assigned to a member of the Contracts Team	Approved
Preliminary Review	Submission has been approved and is under review by a member of the JHTV Contracts Team	Approved
Negotiating	The Agreement is under negotiations by a member of the JHTV Contracts Team	Approved
Awaiting Signature	The terms of the Agreement are finalized and the parties are executing the Agreement	Approved
Active/Fully Executed	The Agreement is fully executed	Complete
Closed	The Agreement was closed	Complete