

**UNIVERSITY OF ROCHESTER**  
**MATERIAL TRANSFER AGREEMENT CHECKLIST**  
(Sending Materials Checklist)

Material Transfer Agreements are entered into as a means of protecting the intellectual and property rights of both parties. Agreements between academic institutions or academic and not-for-profit institutions are generally the quickest to execute. However, agreements involving industry often take longer to complete because they frequently contain language that attempts to restrict the scientist's rights to publish and own inventions. These matters must be appropriately negotiated so that the scientist's research and University's pre-existing obligations are not compromised.

University of Rochester Scientist \_\_\_\_\_

Phone # \_\_\_\_\_

1) Description of material to be sent: \_\_\_\_\_  
\_\_\_\_\_

2) Background Information:

a) Is the material related to an Invention Disclosure, prior MTA or patent application?  
Yes \_\_\_ No\_\_\_ (If so, please identify)

b) Please identify any 3<sup>rd</sup> party funding source for the research generating this material.  
\_\_\_\_\_

c) Please indicate who will be receiving the material: Academia / Nonprofit \_\_\_ or Industry \_\_\_

Requesting Scientist and Institution: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

3) Is there any fee or shipping/handling charges associated with the transfer? Yes\_\_\_ No\_\_\_

\* We are requesting this information due to a change in the NY tax laws regarding income tax additional paperwork is necessary if such payment is required.

4) How would you like this MTA to be sent? (Please check one)\_\_\_ E-Mail \_\_\_ 1<sup>st</sup> Class Mail\_\_\_ FedEx

If E-mail was selected, please provide:

Requesting Scientist's E-mail address \_\_\_\_\_

If FedEx was selected, please provide:

FEDEX Account # \_\_\_\_\_

FEDEX Reference # \_\_\_\_\_

**Please return the completed form to:**  
**Office of Research and Project Administration or Box 270140**  
**Fax 275-9492 ATTN: ORPA/MTA**