

ONLINE SUBMISSION FOR INTELLECTUAL PROPERTY DISCLOSURES AND AGREEMENT REQUESTS

If you have any queries, comments or would like to provide feed-back regarding the online access, please call 18-7832 or send an email to martin.haardt@uhnresearch.ca.

Online submissions are currently available for:

- Intellectual Property Disclosure (IPD)
- Agreement: Material transfers into UHN (MTA in)
- Agreement: Material transfers from UHN (MTA out)

IMPORTANT NOTICE

DO NOT SUBMIT ANY MTA REQUESTS UNLESS:

- **for MTA out:** you have received the completed UHN template from the receiving party AND you have REB approval for any MTA where REB approval is required. To select the appropriate MTA template for materials sent out from UHN, please go [HERE](#).
- **for MTA in:** you have completed the providing party's template prior to submission an MTA request to our office.

In order to proceed with your MTA request and to finalize the agreement, we need the completed templates (either the template from UHN for materials to be sent out or the template from the sending organization for materials to be sent to UHN).

Your online request cannot be completed without the required information.

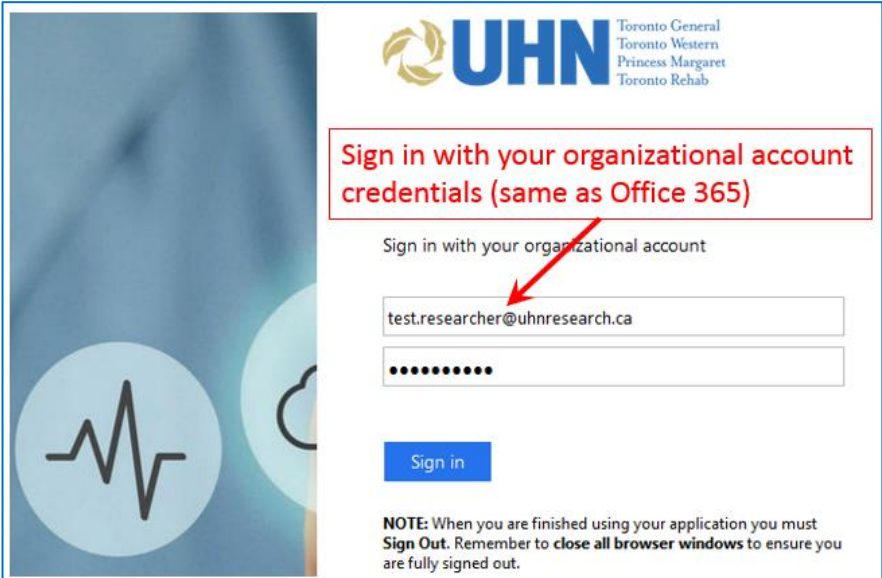
Accessing the Database (Sophia)

To submit an Intellectual Property Disclosure, or to submit a request for any of the above listed Agreements, please sign in [HERE](#) or copy and paste this URL (<https://uhn.wellspringsoftware.net/kms/saml/login/?from=%2F>) into your browser.

You will need to provide your:

- UHN email address (FIRSTNAME.LASTNAME@...)
- UHN login password

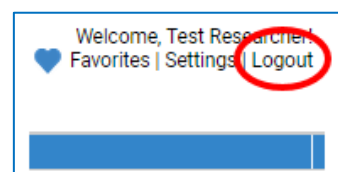
These are the same credentials you use for Office 365. You can bookmark the login page in your browser for future ease of use.



Once your credentials are verified by UHN Digital, you will be automatically directed to your homepage in the Sophia database. From here you can submit a request for an Agreement or submit an Intellectual Property Disclosure (see [next page](#)).

For security reasons, please log out at the end of each session. You will be automatically logged out of the database at the end of each day. Please follow the process described above to login again.

!!! DO NOT SAVE YOUR LOGIN CREDENTIALS ON ANY COMPUTER AVAILABLE TO THE PUBLIC. !!!



Your Sophia Homepage

From your personal homepage, you can:

- choose a new submission from the Tasks box;
- review your previous submissions; and
- make changes to previous submissions prior to acceptance by our office (Submission Status: “Under Review” or “In Process”).

Customizing your Homepage

Due to database configuration it may happen that your homepage displays sections in duplicate (1). To remove a duplicate section, click on “Customize Home Page” in the Tasks box (2), click one of the “x” to remove one of the duplicate sections and complete the customization by clicking “Finish” (3). You can also use this function to select the sections you want to display on your homepage.

You can permanently change your homepage view settings to show your preferred number of entries per page for each section.

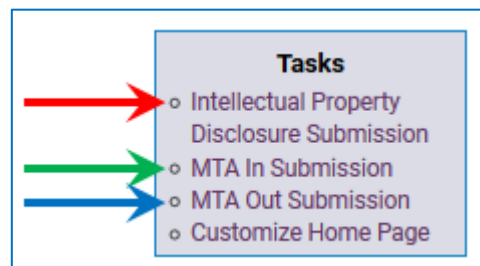
While the default sort order within the tables is by “Submit Date”, you can sort the content of each table by clicking on any of the column titles (“Track Code”, “Title”, “Submit Date” or “Submission Status”).

Track Code	Title	Submit Date	Submission Status
OA2018-00048	MTA Out Submission	Sep 24, 2018 1:59 PM	In Process
OA2018-00064	MTA In Submission	Sep 28, 2018 11:07 AM	In Process
OA2018-00050	MTA Out Submission	Sep 25, 2018 8:58 AM	Under Review
OA2018-00060	MTA Out Submission	Sep 28, 2018 9:26 AM	Returned
OI2018-00049	Intellectual Property Disclosure Submission	Sep 24, 2018 2:00 PM	Accepted
OA2018-00051	MTA In Submission	Sep 25, 2018 12:14 PM	Accepted
OI2018-00052	Intellectual Property Disclosure Submission	Sep 25, 2018 1:29 PM	Accepted
OA2018-00046	MTA In Submission	Sep 24, 2018 1:55 PM	Declined

If you have any queries, comments or would like to provide feed-back regarding the online access, please call 18-7832 or send an email to martin.hardt@uhnresearch.ca.

New Submissions

For any new submission, follow the appropriate link in the Tasks box:



Complete all required fields (marked “*”) and provide as much information as possible in any of the non-required fields. Please provide all relevant documents by uploading the documents on the “Submit” page (see below for more details on how to provide documents).

You will be notified by one of our staff members that we have received your submission and we will contact you if we require any further details.

Please note:

1. **For MTAs:** please ensure that you have either the completed UHN template (MTA out) or the providing party’s template (MTA in) prior to submission an MTA request to our office. You also need to provide REB approval for any MTA where REB approval is required. To select the appropriate MTA template for materials sent out from UHN, please go [HERE](#).

If you have any queries regarding MTAs,
please call 18-8813 or send an email to MTAs@uhnresearch.ca.

2. **For Intellectual Property Disclosures:** all information is submitted online and a document, to be signed by all listed UHN inventors, is provided by our office shortly after submission.

If you have any queries regarding Intellectual Property Disclosures,
please call 18-7832 or send an email to martin.hardt@uhnresearch.ca.

Making Changes to Your Submissions

On the “Submit” page you can review the information and make changes to the information as needed prior to submitting.

The screenshot shows a submission page for "Submission OA2018-00064". At the top right, there are checkboxes for "MTA In" and "Submit". Below this is a green "Check Your Data" section with a message: "Please review your request. You may edit it by clicking the links provided. If it is correct, please click Submit for approval." A "Submit" button is located to the right of this section. Below the "Check Your Data" section is a "Submission Details" section with the following information:

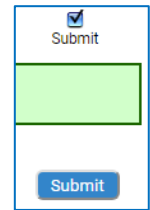
Track Code	OA2018-00064
Submission Type	MTA In Submission
Submission Status	In Process
Create User	Test Researcher on Sep 28, 2018 11:07 AM
Modify User	Test Researcher on Sep 28, 2018 11:07 AM

Below the "Submission Details" section is a "Submission Questions" section with a "MTA In" button. A red box highlights a pencil icon in the bottom right corner of the page with the text "Click here to make changes to your submission."

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please call 18-7832 or send an email to martin.hardt@uhnresearch.ca.

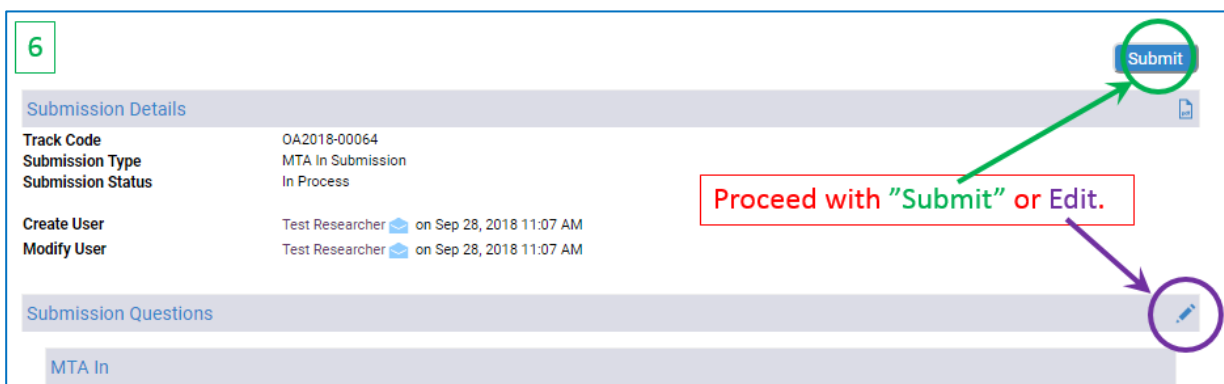
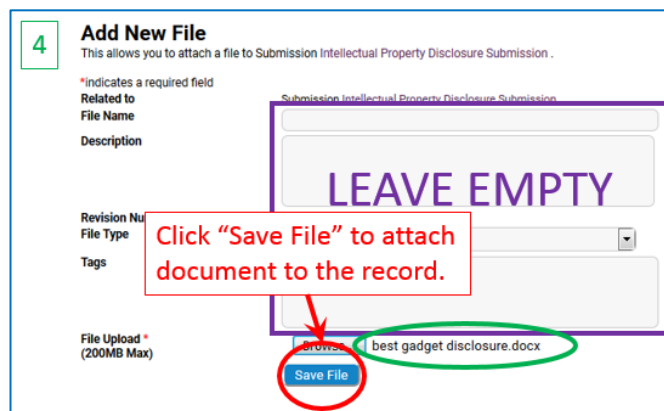
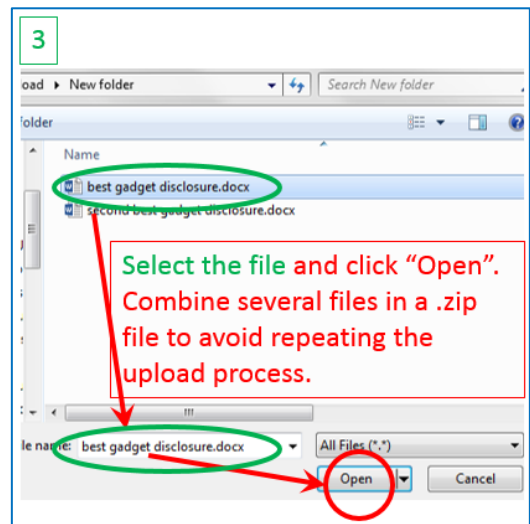
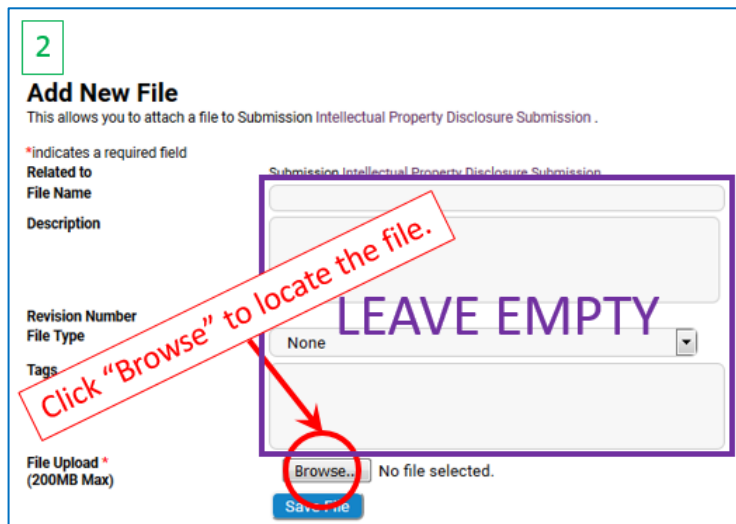
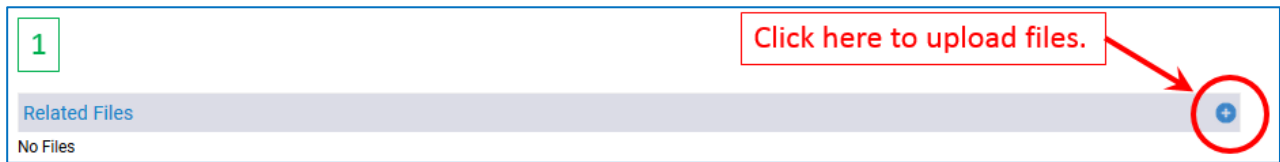
Providing Documents

For all new (“In Progress”) and “Under Review” submissions, you can upload documents on the “Submit” page.



NOTE: Although there is a number of blank fields on the “Add New File” page (see image 2 below), please leave all fields blank. Only click on the “Browse” button to select your document.

On the “Submit” page go to “Related Files” at the end of the page:



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