Material Transfer/ Data Use Checklist

Negotiation/Internal Approvals

☐ Send draft Material Transfer or Data Use Agreement and sponsor contact information to your
assigned specialist.
  o Specialist assignments can be found here: http://go.uth.edu/PreAwardcontacts
  o Contracts Specialist will negotiate the terms of the agreement directly with the sponsor.
    Send these items to your Contracts Specialist upon receipt so that negotiations can begin as
    soon as possible.

☐ Prepare Non-Monetary Review and Approval Form (found here: provide URL and hyperlink)
  o Ensure that all fields are adequately filled. Be accurate and descriptive when listing the
    material and/or data
  o List the collaborating institution’s contracts contact
  o Fill out either the UT Providing or UT Receiving sections, as appropriate
  o Fill out the RCOI form completely
  o Ensure that all Institutional Compliance boxes marked “approved” or “pending” are
    accompanied with the appropriate approval letter. The project/protocol title for each letter
    should match the Project Title field under Institutional Compliance
  o Ensure that the PI and the Department have signed the form
  o Email entire form with all applicable approvals to OSP Specialist

Execution

Contracts Specialist will send contract to PI for “Read and Understood” concurrence or signature
once an agreement has been finalized between UTHealth and the sponsor. Contracts will then sign
and send the partially executed contract to the sponsor for signature. A copy of the fully executed
agreement will be sent to the department and PI for their records.

NOTE: The agreement cannot be signed until all institutional compliance documents are provided
to Contracts

The Checklist serves as a basic guide to assist in the preparation of submissions. This checklist is not a substitute for Departmental review. All forms must comply with agency guidelines and UTHealth policy. Checklists are NOT required to be submitted with F&A Packets, but when completed correctly they frequently facilitate the review process.