Using Your Addgene Tech Transfer Account

TABLE OF CONTENTS

About Addgene

Mission Driven

Addgene is a global, 501(c)(3) nonprofit, repository dedicated to accelerating scientific research and discovery by improving access to useful research materials and information.

Realized Efforts

Since 2004, we have been helping busy scientists save time and money by providing an efficient and affordable resource through which they can archive, share and receive materials. Below is a snapshot of our supportive efforts (as of May 2019).

The Repository		Distributions	
Number of Deposited Plasmids:	101,101	Number of Plasmids Shipped on behalf of Scientists:	1,128,123
Number of Depositing Scientists:	4,179	Number of Fulfilled Requests:	388,065
Number of Depositing Institutions:	993	Number of Requesting Institutions:	6,882
Number of Countries Represented:	46	Number of Requesting Countries:	94

Better Together

Every distribution has the potential to lead to groundbreaking results and real world applications—none of which could have been made possible without the help and support of offices like yours.

Benefits

In addition to supporting the global research community generally, working with Addgene has immediate and specific benefits for you and your scientists.

For your scientists:
- Archival of quality plasmids
- Fulfillment of journal and grant requirements
- Time and money saved in fulfilling material requests themselves
- Easy recordkeeping
- Increased visibility and citations
- Access to thousands of plasmids within a few business days

For your office:
- Materials shared under the UBMTA
- No more negotiating MTAs between academic institutions
- More time to spend on complex agreements and negotiations
- Real time recordkeeping of "materials out" and "materials in"

Your Addgene Tech Transfer Account

Overview
Addgene Tech Transfer Accounts provide your office with the means to approve incoming or outgoing materials, download executed MTAs and summaries, and adjust reporting preferences.

Account Functionality
Below is a summary of account functions based on agreement status.

Deposits to Addgene ("Materials Out")

	Agreement per Deposit	Master Agreement
Approve materials online		X
Auto-approve deposited material		X
Track distributions in real time	X	X
Manage distribution settings for deposits		X
Download executed MTAs	X	X
Download distribution summaries	X	X
Manage contacts for reports	X	X
Adjust email report frequency	x	X

Requests from Addgene ("Materials In")

	Hard Copy / Signed PDF	eMTA	Master Agreement
Approve requested materials online		X	X
Pre-approve MTAs and other agreements			X
Track incoming materials in real time		X	X
Download executed MTAs		X	X
Downloading request summaries	X	X	X
Manage contacts for reports	X	X	X
Adjust email report frequency	X	X	X

Need Help? Have a Question about a Process?
We understand that we do things a bit differently than other repositories. In order to help our tech transfer colleagues better understand our processes, we have provided detailed explanations of deposits and requests here: https://www.addgene.org/techtransfer/tto/

If you are unsure of where to look, you can also type your query into the Help Center found at the bottom right of every webpage.

Account Homepage

Upon logging into your account, you will see the webpage below (the "Homepage").[1] You will be able to review pending materials, view records and change preferences by clicking the applicable links within the "Deposits" and "Requests" panels. Further instructions are provided through each link.

New Deposits

This page displays plasmids pending approval for deposit into, and distribution by, Addgene. If your organization:

- executes a deposit agreement each time a deposit is submitted to Addgene, then this page is <u>informational only</u> and the "Approve Selected Items" button (red arrow) <u>will not</u> appear on this page.

- has executed a Master Deposit Agreement, then this page allows you to approve some, or all, pending plasmids by checking the corresponding boxes and clicking the "Approve Selected Items" button (red arrow) at the bottom of the page.

New Deposits by Research Institute to Addgene

The following materials are pending your approval for deposit to Addgene's repository. Click on the name of a material to see the details of the deposit and to allow Addgene to distribute this item to other academic or nonprofit institutions that request it. You may always change your selection later through the "Inventory" page.

To approve all of the following materials for deposit to Addgene, click "Select All", and then click on "Approve Selected Items".

To approve all of the materials from one particular deposit initiated by a lab, use the filters on the right to select the appropriate deposit by the deposit ID, check off all the items from the deposit (use shift-mouse click to select multiple items), then click on "Approve Selected Items".

1

Select All | Select None

	Material ID	Deposit ID	Material	Provider PI	Status	Deposit On	Ancillary Agreements
☐	987654	12347	pHelper	Example PI A	Undecided	Oct. 31, 2020	3rd Party Terms
☐	987653	12347	pAAV-RepCap5-v2 (modified RepCap promoter)	Example PI A	Undecided	Oct. 31, 2020	3rd Party Terms
☐	654321	12346	pAAV-RepCap2-v2 (modified RepCap promoter)	Example PI B	Undecided	Aug. 1, 2020	
☐	654320	12346	pAAV-RepCap8-v2 (modified RepCap promoter)	Example PI B	Undecided	Aug. 1, 2020	
☐	631000	12346	pAAV-RepCap8-v3 (add p5 promoter 3' of Cap gene)	Example PI B	Undecided	Aug. 1, 2020	
☐	632999	12345	YCe1887 HC_Kan_NeonGreen2_p9	Example PI C	Undecided	Jul. 4, 2020	3rd Party Terms

Filter by Provider PI

All

Example PI A

Example PI B

Example PI C

Filter by Deposit ID

All

12345

12346

12347

1

Approve Selected Items

If you need additional information about a pending plasmid, you can click on the plasmid name in the "Material" column. You should see something similar below. If your organization has executed a Master Deposit Agreement, you can also set the plasmid's distribution status by choosing the applicable option (green arrow) and clicking "Submit Changes" (purple arrow) If your organization has not executed a Master Deposit Agreement, this area will be grayed out and unavailable.

987654: pHelper

Addgene ID:	12347
Deposit Date:	Oct. 31, 2020
Providing Scientist:	Example PI A
Submitted By:	Research Institute on behalf of depositor
Providers:	Research Institute
Item Description:	pHelper
Patent/Licensing/MTA information provided by the Providing Scientist:	*Are there any restrictions or other obligations related to this material that could affect Addgene's distribution to academic labs?* ANSWER: **No.**
	If you did not originally clone this gene, please list from whom and where you received it. ANSWER: **Left empty**
Current Distribution Status:	● I will make a decision later ○ Distribute ○ Do not distribute
	By making changes on this page, you certify that you are an authorized representative of Addgene and that you agree to these selections pursuant to the Reception agreement between Addgene and Addgene.
	Submit Changes
Available to Industry Requesters:	no
Approval History:	Approval History
Required Agreements:	UBMTA
Distribution Log:	Distribution Log

Inventory

After a plasmid has been approved, it will become part of your organization's inventory. You can filter your inventory display by distribution status or PI (orange arrows) as well as download year by year summaries (blue arrow). If you need more information about a particular plasmid or if you wish to change its distribution status, you can click on its name in the "Material" column (red arrow).

Upon clicking the name, you will be directed to the page below. From here, you can stop distribution of a plasmid by selecting "Do not distribute" and clicking the "Submit Changes" button.

123457: pPlasmidB

Addgene ID:	123457
Deposit Date:	Jan. 1, 2020
Providing Scientist:	Example PI A
Submitted By:	Example PI A on behalf of depositor
Providers:	Research Institute
Item Description:	pPlasmidB
Patent/Licensing/MTA information provided by the Providing Scientist:	*Are there any restrictions or other obligations related to this material that could affect Addgene's distribution to academic labs?* ANSWER: **No.**
	If you did not originally clone this gene, please list from whom and where you received it. ANSWER: **Left empty**
Current Distribution Status:	◯ **I will make a decision later** 🔵 **Distribute** ◯ **Do not distribute**
	By making changes on this page, you certify that you are an authorized representative of Addgene and that you agree to these selections pursuant to the Reception agreement between Addgene and Addgene.
	Submit Changes
Available to Industry Requesters:	no
Approval History:	Approval History
Required Agreements:	UBMTA
Distribution Log:	Distribution Log

FAQ: Why is there a "left empty" response? Does Addgene confirm this?
Determining which components have been included in a plasmid and where they originate is a cooperative effort among the depositing lab, Addgene's scientist team and your office. If the response is left empty, this means that the depositing lab did not readily know this information. Fortunately, Addgene is aware of many of the popular components and has procured the rights to distribute them. There are some we cannot accept, however, and we will let the lab know. Of course, while we do our best to identify these materials, if your office knows of any restrictions, please let us know!

Distributions

From this page, you can:

- Obtain distribution ("materials out") reports (in .csv) detailing which materials went to whom by clicking on the year (blue arrow) at the top of the page,

- View and "Print to PDF" executed outgoing MTAs by clicking on the number in the "Order" column (red arrow), and

- Filter the distribution log based on the Providing PI by clicking on a PI's name in the "Filter by PI" box (orange arrow).

Materials Distributed by Research Institute via Addgene

Download Excel summary for:

2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018

Depending on the number of orders, logs could take several minutes to download. Please do not reload the page.

| 1 | 2 | 3 | » |

Material ID	Deposit ID	Material	Provider PI	Recipient PI	Recipient	Order	Order Date
123	1000	aPlsmd	Example PI A	Jane Doe	International School	100800	June 6, 2018
123	1000	aPlsmd	Example PI A	John Doe	World Research Inst.	100700	May 30, 2018
456	2000	aVector	Example PI F	Dexter Whom	US Institution ABC	100600	May 30, 2018
789	3000	aPkector	Example PI D	Sci Guy	Int'l Institution 123	100500	April 24, 2018
123	1000	aPlsmd	Example PI A	Reed Researcher	College University	100400	April 24, 2018
456	2000	aVector	Example PI F	Prince Vestigator	Global Research Org.	100300	April 23, 2018

Filter by Provider PI

All

Example PI A

Example PI B

Example PI C

Example PI D

Example PI E

Example PI F

| 1 | 2 | 3 | » |

Deposit Preferences

If your organization has executed a Master Deposit Agreement, you can choose to automatically approve all future materials deposited to Addgene by choosing the "Yes" selection and clicking the "Submit Changes" button directly below (red arrow). If your organization has not executed a Master Deposit Agreement, this area will be grayed out.

In addition, you can choose who receives emailed notices of deposit requests and distribution reports and at what frequency in the "Reporting Options" section below. Simply type in the email(s), select a frequency and click "Submit Changes" (blue arrow).

FAQ: My director likes seeing reports but doesn't want them daily. Can reports be sent to her at a different frequency?
Unfortunately, our system is unable to accommodate this request at this time.

New MTAs

This webpage displays all orders ("materials in") currently pending approval by your office. You can get more information about a specific ordered material by clicking on its name (blue arrow). You can then electronically approve these orders by first clicking on the number in the "Order" column (red arrow).

New Incoming Materials to Research Institute through Addgene

The following materials have been requested by your institution's scientists from Addgene's repository and are pending approval for shipment.

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Order	Recipient PI	Materials	Date
987654	Skylar Scientist	**pCRISPEN** **Providing Scientist:** Gene Blue **Providing Institutions:** International Biomedical Institute **pCRISPRcherry** **Providing Scientist:** Gene Blue **Providing Institutions:** International Biomedical Institute	June 14, 2018
987654	Skylar Scientist	**mVenus-Plasmid** **Providing Scientist:** Rick Researcher **Providing Institutions:** US Research University	June 14, 2018
400348	Ophelia Orderer	**mVectorGFP** **Providing Scientist:** Eric Experiment **Providing Institutions:** National Research Institute (NRI) **mVectorRFP** **Providing Scientist:** Eric Experiment **Providing Institutions:** National Research Institute (NRI)	May 14, 2018

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FAQ: Why do I have to approve more than 1 MTA for the same order?
Addgene distributes materials on behalf of its depositing institutions. This includes facilitating the execution of MTAs on their behalf. Addgene is not part of the MTA. Accordingly, if an order contains materials from different institutions, then additional MTAs will be required.

Upon clicking the order number, you will be directed to the Electronic Approval page. From here you can:

- Get material-specific information by clicking on its name (purple arrow),
- Review and sign MTAs by clicking "Click Here to Review" in the "Implementing Letter" column (green arrow),
- Access a copy of the Recipient Scientist Acknowledgment for by clicking the named link (blue arrow) under the "File" column in the "Related Forms" section, and
- Update your organization's official address for Incoming Materials and/or your organization's representatives authorized to sign MTAs by clicking the "Update" link (red arrow) in the "Institution Information" section.

Incoming Materials

From this page, you can:

- Download reports (in .csv) detailing your scientists' material requests and the providing institutions by clicking on the year (blue arrow) at the top of the page,

- View and "Print to PDF" executed incoming MTAs by clicking on the number in the "Order" column (red arrow), and

- Filter the incoming materials log based on the Recipient PI by clicking on a PI's name in the "Filter by Recipient PI" box (orange arrow).

Clicking an order number will direct you to a page similar to below. To view a copy of the executed MTA, click on the "Approved" or "Print" link (red arrow) in the "Implementing Letter" column.

Order 387369 - Electronic Approval

A request has been made by the laboratory of Bob Barry for biological materials available from Addgene. Your institution, Research Institute, must approve this request.

Implementing Letters to Review and Approve - Order 387369

To approve a request, use the Click Here to Review link to review each MTA implementing letter, then **click on the Submit button** to sign the implementing letter electronically. You will receive confirmation of your electronic signature.

Status	Original Material	Provider	Implementing Letter
Approved	pl-MCherryTomato	World Research Org.	Approved (Print)

Electronic signature: Entering an authorized representative's name and contact information and subsequently clicking on the Submit button constitutes an electronic signature, pursuant to the U.S. Electronic Signatures in Global and National Commerce Act of 2000. Please note that you may access a receipt of this electronic signature using the URL for this web page.

Forwarding information:

If you are not the authorized signatory for your institution, please forward him or her the email you received with the secure link to this page. Please note that copying the URL directly from your browser will not grant access to this page. If you have any questions, please contact us.

Related Forms - Order 387369

File	Description
Recipient Scientist Acknowledgment	Electronically submitted by scientist

Pending Orders:

Including this order, there are 2 orders pending your approval.

Order 987654 by Skylar Scientist, June 14, 2018

Order 400348 by Ophelia Orderer, May 14, 2018

If you have any questions about these outstanding transactions, please contact Addgene.

Institution Information

The following information will be used for the MTA. Update .

Official Institution Address:

Tech Transfer Office
Research Institute
12345 Anywhere Street
Metropolitan, State 12345
US

Authorized Representative:

Dana Director, ttodirector@researchinstitute.edu

Request Preferences

If your organization has executed a Master Reception Agreement, you can choose to pre-approve the UBMTA and any additional terms associated with the requested material by ticking the box next to the corresponding terms. To view these terms, click the links under the "Agreement" column. After making your selection(s), click the "Submit Changes" button (red arrow) (button is hidden if your organization has not executed a master agreement).

Any requests for which all material terms have been pre-approved will be auto-approved after your scientist has completed the necessary forms (e.g., Recipient Scientist Acknowledgment). You will receive a notification that the request has been auto-approved. If a material has terms that have not been pre-approved, you will be prompted to review and sign the MTA.

Incoming Preferences

Automatic Approval Options

Addgene's mission is to simplify and expedite the material transfer process. You have the option of logging on to approve each request of materials deposited at Addgene by a Addgene scientist, or you can automate the process.

By choosing to automatically approve certain material transfer agreements, you, on behalf of your institution and pursuant to the Reception agreement between Addgene and your institution, are permitting Addgene to distribute any material with some or all of the chosen material transfer agreements to Addgene's scientists, and are agreeing to be bound by those material transfer agreements on each such distribution. Addgene will not distribute materials with material transfer agreements other than those chosen below to your scientists without your approval; Addgene will notify you of such transfers and allow you to explicitly review and approve the transfers.

Agreement	Auto Approve	Notes
Ancillary Agreement for Penn AAV Trans Plasmids	☐	
Ancillary Agreement for Penn Vectors	☐	
Ancillary Agreement for Plasmids Containing FP Materials	☐	
Cellecta Lentiviral Pooled Plasmid and Packaged shRNA Libraries Ancillary Agreement	☐	
Duke Limited Ancillary Agreement for dCas9	☐	
Genentech pRK5	☐	
genOway Notice of Rights	☐	
IGBMC Cre-ERT2	☐	
Industry MTA	☐	
Michigan-IRE1	☐	
Nolan plasmid Ancillary Agreement	☐	
Pittsburgh 2nd Generation Tet Promoter	☐	
Sanford-Burnham Medical Research Institute Ancillary Agreement	☐	
Sangamo Zinc-Finger Agreement	☐	
Simple Letter Agreement	☐	
SKI-Phluorin	☐	
Synthetic Protein	☐	
UBMTA	☑	
University of Pittsburgh - PolB	☐	
Vanderbilt-Cerulean	☐	

In addition, you can choose who receives emailed notices of material requests and approval notices and at what frequency in the "Reporting Options" section above. Simply type in the email(s), select a frequency and click "Submit Changes" (blue arrow).

**FAQ: Why are there additional terms? Who adds these?**
Plasmids are modular by nature. Scientists frequently build plasmids with third party, proprietary components (IP). In order for Addgene to distribute plasmids containing IP, some third parties (mostly for-profit companies) require that the plasmid include ancillary terms to account for their IP. These terms are added when Addgene, the depositing scientist, or even the 3rd party, note a plasmid contains IP. These terms don't affect you as a depositor.

FAQ: I'm confused. How exactly does auto-approval work?
We understand that it's pretty confusing. See the next section for a graphical explanation.

Auto-Approving Requests ("Materials In")

Below is an example of how three institutions with different pre-approval preferences process the same plasmid.
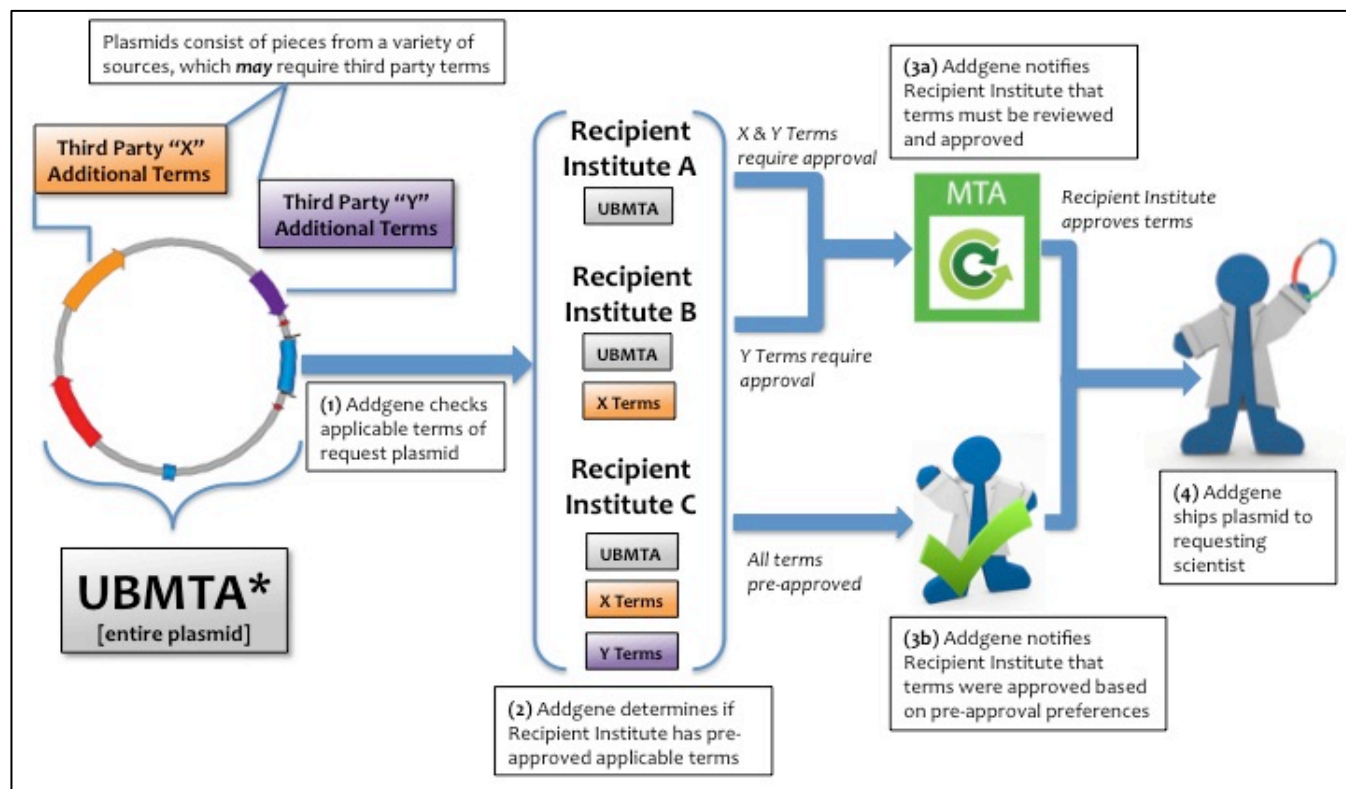
*Uniform Biological Material Transfer Agreement

Background. All plasmids are transferred under the UBMTA to academic/nonprofit organizations. The plasmid in this example contains two 3rd party IP components (X and Y), which require recipient institutions to agree to terms in addition to the UBMTA.

Step 1. Scientist places order for plasmid. All terms associated with plasmid (UBMTA, X Terms, and Y Terms) are bundled into MTA packet.

Step 2. Addgene determines if recipient institute has pre-approved applicable terms. In this example, Institute A has only pre-approved the UBMTA; Institute B has pre-approved the UBMTA and the X terms; and Institute C has pre-approved the UBMTA, X Terms and Y Terms, i.e., all terms associated with the requested plasmid.

Step 3a. Because not all plasmid terms have been pre-approved (Institute A needs to review X Terms and Y Terms; and Institute B needs to review Y Terms), Addgene notifies the recipient institute to review and approve the MTA.

Step 3b. Because all plasmid terms have been pre-approved (Institute C has pre-approved the UBMTA, X Terms and Y Terms), Addgene notifies recipient institute that the request has been auto-approved.

Step 4. Once the MTA is approved, Addgene begins growing plasmid in lab. The plasmid typically leaves Addgene in 1-2 business days.