

# **A User Guide for Processing of NDAs, MTAs, DUAs and Other Agreements**

**(For Faculty)**

Prepared By:

Office of Sponsored Programs (OSP) and Office of Industry Contracts (OIC)

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## INTRODUCTION

*This user guide contains instructions on the processing of NDAs, MTAs, DUAs and Other Agreements for faculty members. All the steps are to be performed on the Infoed website.*

### Agreement Intake Requests

**Request an Agreement by clicking the button below. If additional agreements are needed, repeat the process by selecting the options below.**

- An Intake Form will open up that is required to be filled out and submitted once all mandatory questions have been completed.

**If you are looking to perform a sponsored research project funded by a third party, please do not create an agreement here. Instead, work through your college pre-award office to submit the proposal/budget.**

[Agreement Intake Form](#)

**Amend an existing Agreement.**

[Amendment](#)

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# Chapter 1 - Initiating an Agreement Request



1. Enter the Infoed URL in your browser - [infoed.clemson.edu](http://infoed.clemson.edu)
2. Scroll down the screen and click **Agreement Intake Form**.

Agreement Intake Requests

**Request an Agreement by clicking the button below. If additional agreements are needed, repeat the process by selecting the options below.**

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**If you are looking to perform a sponsored research project funded by a third party, please do not create an agreement here. Instead, work through your college pre-award office to submit the proposal/budget.**

**Amend an existing Agreement.**

3. Start by answering all the questions marked with an asterisk.

**RESEARCH-RELATED AGREEMENTS INTAKE FORM**

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**RESEARCH-RELATED AGREEMENTS INTAKE FORM**

**\* I am requesting an agreement for:**

Myself

Another Individual

**\* Deadline**

Yes

No

**\* The primary purpose for this agreement is to:**

Disclose and/or receive confidential information

Provide and/or receive physical materials

Provide and/or receive research data

Receive loaned equipment from a third party for use in educational or research activities

Provide testing or other research related services at billing rates approved by the University

Receive third party funding or other support for a student project team performing a project in a course for credit (e.g. Senior Design/Creative Inquiry)

Join a research organization external to Clemson or have an external party join a Clemson research organization (e.g. centers/institutes)

None of the above

- For requests related to another project, click “Yes” and continue to follow the instructions or else click “No” and skip to [page 9](#) to continue answering the remaining asterisk questions, as applicable.

**AGREEMENT REQUEST DETAILS**

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**AGREEMENT REQUEST DETAILS**

**Non-Disclosure Agreement Questions**

**\* Briefly describe why you are exchanging confidential information:**

**\* Is this agreement related to a current or proposed sponsored project?**

Yes  No

**If yes, provide the Proposal Processing Number (PPN) or the Project Account Number.**

	PI:	Title:	Status:	
<b>* Proposal Number:</b>				

- Click the **yellow plus icon** to search for linked proposals. A new window opens.

6. Within the pop-up window, in the search box, enter your proposal (PPN) number to search for your linked project and click **Search**. You can also **Browse By** one of the options listed below if required.

Add Proposal

Select by Number:  Search

**Apply Filters**

**Browse By**

Sponsor/Scheme <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>	Principal Investigator <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>
Sponsor Type <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>	Investigator <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>
Primary Center/Program <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>	Primary Assoc. Dept. <input style="width: 90%; border: 1px solid gray;" type="text" value="- Select -"/>
Center/Program <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>	PI Department <input style="width: 90%; border: 1px solid gray;" type="text"/> <a href="#">Set</a>

Search
Clear All



7. Your search generates a record at the bottom of the window. Scroll down and click the checkbox next to the linked proposal, and then click **Select**.

AI: Applied  
 AI: Funded  
 AI: Declined  
 BSSI: Applied

TMF: Declined  
 Agreement Negotiation  
 Executed Agreement

URGC: PC Funded  
 URGC: PIG Declined  
 Intake Form Completed

Number	Title	Creation Date	PI	
2024000362	Master Agreement 16-Aug-2023 - 15-Aug-2028	07-Sep-2023	Lapidas, Adam Samuel	<input checked="" type="checkbox"/> <span style="border: 2px solid orange; padding: 2px 5px;">Select</span>

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items per page

1 - 1 of 1 items ↻

Once you link the proposal, it will appear on the screen as shown below.

**\* Is this agreement related to a current or proposed sponsored project?**  
 Yes  No

**If yes, provide the Proposal Processing Number (PPN) or the Project Account Number.**

* Proposal Number:	PI:	Title:	Status:	
<a href="#">2024000362</a>	Lapidas, Adam Samuel	Master Agreement 16-Aug-2023 - 15-Aug-2028	Executed Agreement	

8. Continue answering the questions marked with an asterisk within the same window.

\* Select one of the following options:

- I am requesting that Clemson drafts an agreement to send to the other party.
- I am requesting that Clemson reviews/edits an agreement provided by the other party.

\* Describe the confidential information that Clemson anticipates sharing (be as specific as possible, as this information is necessary for both the agreement and mandatory compliance reviews; if none, enter "N/A"):

Describe the confidential information and click "Save" in the upper right hand corner of the window.

\* Describe the confidential information that the other party to the agreement will likely share (be as specific as possible, as this information is necessary for both the agreement and mandatory compliance reviews; if none, enter "N/A"):

Describe the confidential information shared by the other party and click "Save" in the upper right hand corner of the window.

\* Select one of the following options:

- I will be the only individual disclosing/receiving confidential information under this agreement on behalf of Clemson.
- I will not be the only individual disclosing/receiving confidential information under this agreement on behalf of Clemson.

List other Clemson personnel, including students, who may disclose/receive confidential information under this agreement.

Personnel

If you select the option “*I will not be...*”, the next section is displayed to add another individual.

9. To add a person, click the **yellow plus icon** to search by the person’s name and repeat this step to search for each additional person.

10. If your submission has compliance components in place, click the “*Yes: I have...*” option. Refer to [page 7, step no. 6](#) for instructions on searching and adding applicable protocols.

\* Do you have a current IRB, IBC, IACUC, OES, Export Control/Research Security, or other compliance approval in place?

- Yes: I have worked with the necessary compliance departments prior to submitting this agreement request form.
- No: I need compliance approvals for this matter but have not worked with the necessary compliance departments prior to submitting this agreement request form.
- No: I do not need compliance approval for this matter.
- Unsure: I do not know if compliance approvals are necessary for this matter.

IRB Link

Protocol Number:	PI:	Title:	Status:



IBC Link:

Protocol Number:	PI:	Title:	Status:



IACUC Link:

Protocol Number:	PI:	Title:	Status:



Provide the applicable protocol/approval number: (OES, Export Control/Research Security, or other compliance approvals)

If your request needs (but does not actively have) compliance approvals, click the “*No: I need...*” option, and then select the appropriate checkboxes as depicted below.

**\* Do you have a current IRB, IBC, IACUC, OES, Export Control/Research Security, or other compliance approval in place?**

- Yes: I have worked with the necessary compliance departments prior to submitting this agreement request form.
- No: I need compliance approvals for this matter but have not worked with the necessary compliance departments prior to submitting this agreement request form.
- No: I do not need compliance approval for this matter.
- Unsure: I do not know if compliance approvals are necessary for this matter.

**Compliance approvals needed:**

- IRB
- IBC
- IACUC
- OES
- Export Control/Research Security
- Other

## 11. Continue answering the following questions marked with an asterisk.

**\* Does this request involve a technology disclosed to CURF, intellectual property currently managed by CURF, or technology that needs to be disclosed to CURF?**

Yes  No

**Provide the CURF Tech ID number or write in "needs to be disclosed" if it has not been disclosed already:**

**Provide contact information for the other party to the agreement:**

**\* Entity Name**

**\* Point of Contact Name:**

**\* Mailing Address:**

**\* Email Address:**

**\* Phone Number:**

12. If this is a multi-party agreement, select “Yes” and then click the **yellow plus icon**. Enter the applicable information in the text boxes for the other entities to the contract. Repeat this step for each additional entity.

Is there more than one other party to the agreement?  
 Yes  No

**Additional Party Contact Information:**

Entity Name:	Point of Contact Name:	Mailing Address:	Email Address:	Phone Number:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="🗑️"/>

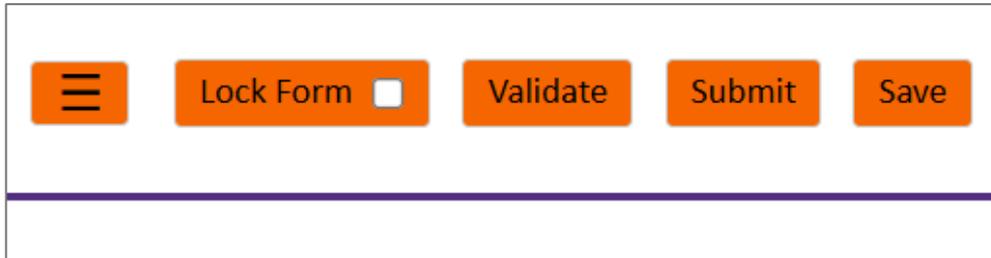
Please provide any additional information about this request that will be helpful for the negotiator:

Upload supporting documentation in the below table:

File:	
<input type="text"/>	<input type="text"/>

Enter any other information relevant to your request in the comments box highlighted above.

13. Click the **Submit** button on the top right corner of the window.



A screenshot of a form control bar. It contains five orange buttons: a menu icon (three horizontal lines), a 'Lock Form' button with an unchecked checkbox, a 'Validate' button, a 'Submit' button, and a 'Save' button. A thick purple horizontal line is positioned below the buttons.

Once you submit the form, you will receive an email notification, and a member of the negotiating staff will contact you.

# Chapter 2 - Post-negotiation Process and Actions



 The negotiator marks the required checkboxes in Infoed, which then automatically notifies you and any individuals you listed in the *Agreement Intake Form*.

1. Check your email for the notification and click the **Reviewer Dashboard** hyperlink. A new dashboard window opens in Infoed with the **Review** tab selected by default.

Agreement Acknowledgement needed for Agreement Titled New...

 Administrator, System <adames@infoedc>  
To:        12:02 PM

**This Message Is From An External Sender:** Use caution when opening links or attachments if you do not recognize the sender.

Dear Dr Adam Samuel Lapid

You are receiving this message because your review and acknowledgement are needed on this agreement. Please follow the [Reviewer Dashboard](#) to open, review, and approve this agreement. If you have any questions or require further clarification, please contact your agreement negotiator or [OSPAAgreements](#)

Thank you,  
OSP Agreements

2. Click the hyperlinks to review all the documents listed on the screen. Read the documents carefully and close the window.

**REVIEW**

**Agreements - Agreement Intake Form**  
**Number:** [AGR-25-0085](#)  
**Title:** New Agreements Created for Dr Adam Samuel Lapidas on 3/20/2025 2:06:49 PM  
**PI:** Lapidas, Adam Samuel  
**Submitted:** 20-Mar-2025 2:13:45 PM

Form/Document	Document Type	Added	Review Status
<a href="#">PI/Team Acknowledgment</a>	eForm	20-Mar-2025 2:06:49 PM	Un-Reviewed
<a href="#">Agreement</a> ⚠️	Agreement	20-Mar-2025 2:06:49 PM	<a href="#">VIEW</a>
<a href="#">PI Contract Review</a> ⚠️	eForm	20-Mar-2025 2:06:49 PM	Un-Reviewed

**ROUTE**

**HELP**

**Add Comments:**  
 To be shared with everyone

**Select a decision:**

Approve

Disapprove

**CLEMSON UNIVERSITY**

PI ACKNOWLEDGMENT

ACKNOWLEDGMENT

1 Principal Investigator Information:  
 Lapidas, Adam Samuel  
**Full Name** Lapidas, Adam Samuel  
**Title** Industry Contracts Assoc.  
**Email** ALAPIDA@clemson.edu

2 Agreement Type:  
 Disclose and/or receive confidential information

3 Sponsor:  
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**CERTIFICATION ACKNOWLEDGMENT**

I hereby certify that I have been provided with a copy of the agreement associated with this AGR Record (the "Agreement").

I agree that I have read the Agreement, understand my responsibilities under the Agreement, and agree to comply with all Agreement requirements.

Attachments.aspx 1 / 6 100%

**Division of RESEARCH**

**NON-DISCLOSURE AGREEMENT**

CU/CURF Reference Number: \_\_\_\_\_

This Non-Disclosure Agreement ("Agreement") is entered into and made effective upon the date of the last signature ("Effective Date") by and between \_\_\_\_\_ having its principal office at \_\_\_\_\_ (hereinafter "Company") and Clemson University, having its principal office at 250 Kappa Street, Suite 200, Clemson, South Carolina, 29634 (hereinafter "Clemson"), individually referred to as the "Party" and collectively referred to as the "Parties." This Agreement establishes the terms and conditions under which the Parties agree to exchange or disclose certain information, some of which may be confidential and proprietary, subject to the restrictions on use and disclosure that are expressed in this Agreement.

**WHEREAS**, the Parties contemplate furnishing to or acquiring from each certain Confidential Information (hereinafter defined), and

**WHEREAS**, the Parties desire to maintain and protect the confidentiality of such information.

**NON-DISCLOSURE**

- Once you have reviewed all the documents, select *Reviewed* from the dropdown next to each document, and then click the **Approve** button.

**REVIEW**

**Agreements - Agreement Intake Form**  
 Number: [AGR-25-0085](#)  
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<a href="#">PI Contract Review</a> ⚠️	eForm	20-Mar-2025 2:06:49 PM	Reviewed

**ROUTE**

**HELP**

**Add Comments:**  
 To be shared with everyone

Select a decision:

Approve

Disapprove

- In the small window that opens, click **OK** to confirm your review.

infoed.dev.clemson.edu says

You are about to complete your review. You will not be able to edit after this decision.

OK Cancel

**Comments**

No Comments recorded

eForm	20-Mar-2025 11:54:13 AM	Reviewed
Agreement	20-Mar-2025 11:54:13 AM	<a href="#">VIEW</a>
eForm	20-Mar-2025 11:54:13 AM	Reviewed

Select a decision:

Approve

Disapprove

If you listed team members in the *Agreement Intake Form*, ensure they follow the same document review steps outlined in their email notification.

The system notifies the university signatory for their institutional signature on the agreement. The negotiator will be in touch with you once the agreement is fully signed.