

Integrated Research Administration Portal (IRAP) Electronic System Powered by InfoEd

Material Transfer Request Portal Handbook for UAB Faculty
and Staff Users



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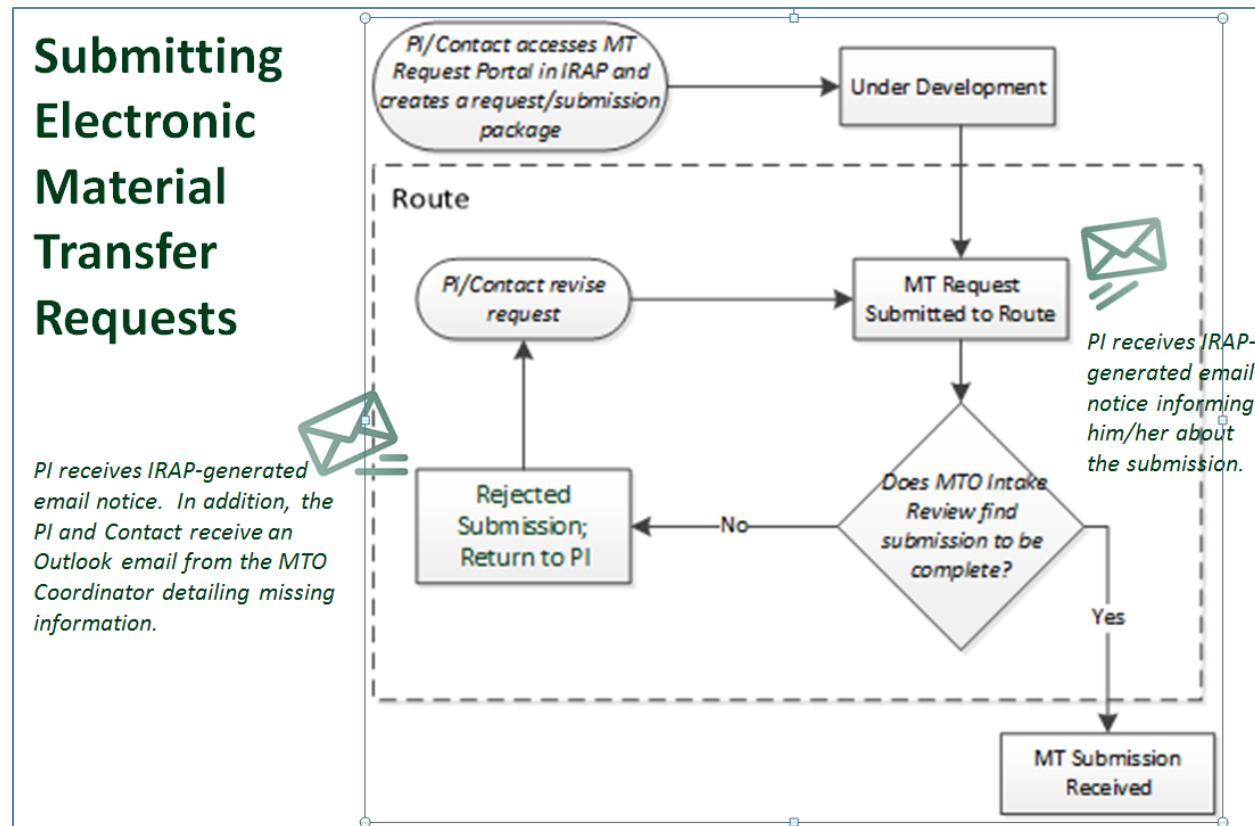
1. MTO/Material Transfers Introduction

Material Transfers is the InfoEd module that serves as a “system of record” primarily for central administration reporting and management of submissions to the Material Transfer Office (MTO). Through this module the campus has access to create and submit electronic material transfer requests via the Material Transfer Request Portal. The use of this portal replaces the current paper forms.

Information about requests submitted to the MTO prior to implementation of the Material Transfer Request Portal is still available through the MTO e-Reports link in IRAP e-Reports. Remember MTO eReports can be used to access information about all submissions to the MTO.

2. An Overview of the Electronic Creation and Submission Process

The diagram below provides an overview of the process for creating and submitting electronic Material Transfer Requests.



Important Reminders About the Electronic Process ...

- Routing for Departmental signatures no longer required (information about submissions will be available via a MTO eReport – Material Transfer Portal Requests).
- Requests created from the portal inherit a status of **Under Development**. As long as a record remains in this status it is available for editing to the (1) Creator of the request and (2) PI listed on the request form included in the submission package. Requests in this status may also be deleted by the PI listed on the request form or the Creator of the request.
- Once the submission package has been completed and submitted, the status moves to **MT Request Submitted to Route**. PI listed in the form will receive an IRAP generated email, notifying him/her of the submission. At this point, the submission package is locked from edit by anyone. A pdf copy of the form is available to the (1) Creator of the request and (2) PI listed on the request form.
- If the MTO rejects the submission package, the status is changed to **Rejected Submission; Return to PI** and is available to the (1) Creator of the request and (2) PI listed on the request form for editing and resubmitting. The PI will receive an IRAP-generated email notifying him/her about the rejected submission. In addition, the PI and contact(s) listed on the request form will receive an Outlook email from the MTO detailing missing information.

3. How to Access the Material Transfer Request Portal

Click the MTO/Material Transfers bar in the left navigation, and then click the Material Transfers hyperlink.

The screenshot shows the IRAP e-Reports interface. At the top, it displays "Logged in User: Joe Investigator" and the date "Thursday, January 25, 2018". On the left, there's a vertical navigation bar with links like "Exit", "Help", "OSP/OIE/Grants & Contracts", "CIRB/Financial Interests", "IRB/Human Subjects", "IACUC/Lab Animals", "MTO/Material Transfers", "Administrative Notes...", and "How to Clear Browser Cache". The "MTO/Material Transfers" link is highlighted with a red box. Below the navigation, there's a search bar with "Find Funding" and a calendar for "January 2018". The main area shows "My Open Action Items" and a message "Records found: 0. Displaying page 0 of 0". On the right, there are sections for "LINKS", "My Calendar", "My Action Items", and "My Workflow Maps".

OSP/OIE/Grants & Contracts

CIRB/Financial Interests

IRB/Human Subjects

IACUC/Lab Animals

MTO/Material Transfers

Material Transfers ▾

- [Agreement Portal](#)
- [Help](#)

My Profile

Administrative Notes...

If you are running reports at the quarters of an hour and receive an error, please run again. The reporting database is refreshed every 15 minutes and may cause a disruption in pulling back the data.

[How to Clear Browser Cache](#)

[IRAP Help Available](#)

[Node Test](#)

[IACUC Deadlines and Dates](#)

[IRB Deadlines and Dates](#)

IRAP Off-Line Schedule Click Here for More Information

1. Complete each page of the form after you have filled it by out clicking the "Completed" box () at the top right corner of each form page.
2. Once each folder of the left hand navigation on the form has a green completed checkmark () , click the "done" button () to return to the submission package.
3. Upload all supporting documents to the submission package and email all related emails to MTO@uab.edu (remember to include your MT request number in the subject line of all forwarded emails).
4. Submit your MT request to the MTO by clicking on the Submit button () .
5. Refresh this page and check to make sure that the status of your request has updated from "Under Development" to "MT Request Submitted to Route".
6. The PI of the MT request form will receive an email notifying them that a request has been submitted.

Material transfer requests can be withdrawn by the PI or the creator of the request while in a status of "Under Development". If a submission should be withdrawn while in any other status please contact the MTO at mto@uab.edu. Include the Agreement ID and the reason for withdrawal in the email.

Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc Irap@uab.edu.

If you have any questions or need further information while completing your material transfer request please visit the MTO website www.uab.edu/mto.

Choose Type of Material Transfer Request : [MTO - Receiving Materials](#) ▾ [Create](#)

Receiving Materials: Incoming Materials to UAB
Sending Materials: Outgoing Materials from UAB
Mutual Exchange: Material(s) are going in each direction

Processing
0 Records to Display

Executed
0 Records to Display

Withdrawn
0 Records to Display

Requests made from the portal are categorized using high-level statuses (i.e. Processing, Executed, Withdrawn).

Visibility of Records in the Material Transfer Request Portal

The following individuals can see records created in this portal:

- The Creator of the record (the person who clicks the create button), and
- The PI listed on the request form in the submission package.

Delegate functionality, consistent with other modules of IRAP, is not currently available.

Deleting or Withdrawing Records in the Material Transfer Request Portal

If the request in the portal is in a status of "Under Development", the PI or the Creator of the record can

Remove

delete the submission from the portal by clicking on the icon beside the record in the portal.

Processing							
Records Found: 6.							
Agreement ID	Agreement	Submission	Date Created	Date Modified	Status	Open Remove	
A-302753 - 00	MTO - Sending Materials	Initial	09-Jan-2018	09-Jan-2018	MT Request Submitted to Route		
A-302751 - 00	MTO - Receiving Materials	Initial	09-Jan-2018	09-Jan-2018	Rejected Submission; Returned to PI		
A-302750 - 00	MTO - Receiving Materials	Initial	03-Jan-2018	09-Jan-2018	Under Development *		
A-302745 - 00	MTO - Receiving Materials	Initial	15-Dec-2017	15-Dec-2017	Rejected Submission; Returned to PI		
A-302747 - 00	MTO - Mutual Exchange	Initial	15-Dec-2017	15-Dec-2017	MT Request Submitted to Route		

If the request is in any other status, the PI should notify the MTO at mto@uab.edu requesting that the record be withdrawn. In these instances, the request will still be visible from the portal, but will be listed underneath the heading of “Withdrawn”.

Can MTO Office withdraw a submission?

Yes. The MTO will withdraw a submission when requested to do so by the Investigator or submitter. The MTO also will administratively withdraw a submission if within 30 calendar days the UAB investigator does not resubmit a submission that was rejected in route, respond to requests for information or clarification, or approve/reject revisions to an agreement. The MTO will notify the Investigator of the intent to administratively withdraw the submission and, if needed, will work with the Investigator to resolve issues that may be contributing to the delay.

4. Creating a Request (i.e. Submission Package)

Access to the Material Transfer Request Portal gives you the ability to create, complete and submit requests to transfer materials. There are three basic types of requests that can be created from this portal.

- Receiving
- Sending
- Mutual Exchange

From the Material Transfer Request Portal, choose the Type of Material Transfer Request and click Create.

<p>If you have any questions or need further information while completing your material transfer request please visit the MTO website www.uab.edu/mto.</p> <p>Choose Type of Material Transfer Request : MTO - Receiving Materials <input type="button" value="Create"/></p> <div style="border: 1px solid red; padding: 5px; margin-top: 5px;"> MTO - Receiving Materials MTO - Sending Materials MTO - Mutual Exchange </div> <p>Processing</p>						
<p>Receiving Materials: Incoming Materials to UAB Sending Materials: Outgoing Materials from UAB Mutual Exchange: Material(s) are going in each direction</p>						

The submission package is created and a number is assigned to your material transfer request. The submission package will include the electronic request form for you to complete. After you complete the form, you will upload any supporting documents to the submission package from this page.

A-30058
Agreement Items

Components for MTO - Receiving Materials - Initial

Submit

Current Submission				
Edit	Status	Upload	Remove	Submitter Comments
	Incomplete		Mandatory	

Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc Irap@uab.edu.

Steps for Submission

Step 1. Click the edit icon (above).
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit () at the top of this page to send the request to the MTO. If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click () to return to the eform pages and complete each page.

Supporting Documents:

- Any **edited** version {such as versions with blanks completed by the UAB PI/Contact} of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}
- Any other applicable documentation

Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:

- The Outlook email with the original, **unedited** Word version of the agreement attached.
- ALL** email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

Top Navigation Menu

The navigation menu located across the top of the submission package includes several important links. Please see the section of this document labeled List of Icons for more details.

Important References in the Submission Package

The submission package includes several key features which are noted in the screenshot below and described in more detail below the screenshot.

Components for MTO - Receiving Materials - Initial		Submit 	1		
Current Submission					
Form/Document Name	Edit	Status	Upload	Remove	Submitter Comments
Receiving Materials Request Form Material Transfer Request Form		Incomplete		Mandatory	
Add Institution Forms/Supporting Documents  2  8					

3

4  Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc Irap@uab.edu.

5 **Steps for Submission**

Step 1. Click the edit icon  above.
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit  at the top of this page to send the request to the MTO. If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click  to return to the eform pages and complete each page.

6 **Supporting Documents:**

- Any edited version {such as versions with blanks completed by the UAB PI/Contact} of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}
- Any other applicable documentation

7 **Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:**

- The Outlook email with the original, unedited Word version of the agreement attached.
- ALL** email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

- 1** Submit Link – You will use this link to send your submission package to the MTO for review/approval.
- 2** Material Transfer Request Form – The correct request form is automatically included in the submission package based on the type of request you submitted from the Material Transfer Request Portal.
- 3** Add Institution Forms/Supporting Documents – You will use this link to add supporting documents to your submission package. Any emails related to the submission should be forwarded to the mto@uab.edu. Please do not add copies of emails (as msg or pdf files) to the submission package.
- 4** Queries/Issues: This balloon provides contact details if you have any questions or issues.
- 5** Steps for Submission – This section provides high-level steps for completing a submission package.

6

Supporting Documents - This section provides examples of supporting documents that may be included in your submission.

7

Supporting Emails – Instructions for forwarding supporting emails to the Material Transfer Office are included here. It is critical that you reference the agreement number in the email you are forwarding to mto@uab.edu.

8

Submitter Comments – UAB does not plan to use this feature.

5. Editing and Completing the Request Form

Edit



Clicking the link beside the request form from the submission package will open the request form to display the electronic request form.

A-300230

General Instructions Page 1. Provider/Recipient Details Page 2. Materials (0) Page 3. General Information	<p>General Instructions</p> <p>Please Read Before Proceeding</p> <p>Full disclosure of the information requested facilitates timely processing of this request</p> <p>To navigate from page to page through the form click on the page name on the left side of this page e.g.,</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Page 1. Provider/Recipient Details </div>  <p>Figure 1.0 - Form Navigation</p> <p>The green checkmarks over the folder on each page indicate that the page has been completed. Click 'Done' in the upper left corner of the page to return to the submission package to upload supporting documents and submit your request to the MTO.</p> <p>IMPORTANT REMINDER: Additional University obligations and/or authorizations with regard to certain materials (such as materials that are to be used in human subjects, hazardous materials, animals, genetically altered biological materials, etc.) may apply.</p>
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A-300230

- General Instructions**
- Page 1. Provider/Recipient Details**
- Page 2. Materials (0)**
- Page 3. General Information**

The first page of the form provides general instructions on how to navigate from page to page through the form. All pages of the form must be “completed” (i.e. have green check mark) in order for the request to be submitted. Instructions at the bottom of each page provide reminders and details about how to complete pages.

Top Navigation Menu

The navigation menu located across the top of request form is slightly different than what you saw at the top of the submission package, but in general the links work in the same manner. Please see the section of this document labeled List of Icons for more details.

Specific Pages of the Electronic Request Form

The electronic form is divided into several pages, each with specific questions designed to capture all of the information necessary to process your request. As you navigate to each page, please take the time to read the instructions to ensure all information is provided in the form. See other sections of this manual for more details about questions included on each request form.

Page 1. Provider/Recipient Details

This page includes questions about the outside entity involved with the transfer as well as both UAB and outside entity personnel associated with the request.

Page 2. Materials

Each material associated with the request must be included on this page. As each material is added, the form displays a detailed list of questions to be answered for each material. After you answer the detailed questions about each material, remember to mark each page as "completed". The form will return you to the materials page where you will see a list of all materials that you have added to the form. The materials page must also be marked as "completed" after you verify that all materials have been added to the request.

Page 3. General Information

The general information page of the form is intended to capture specific information about the research in which the materials will be used (for receiving materials) or the research used to create or collect the material (sending materials). *Note: For mutual exchange requests, the form includes a general information page for the material being sent and the material being received.*

6. Sending the Submission Package to the MTO



After you have completed the request form, you will click done Done to return to the submission package. From the screen below, you will add:

- Click the 'Add Institution Forms/Supporting Documents' link to upload supporting documents to the submission package
- Forward any supporting emails to mto@uab.edu and reference the agreement number in the subject line of the email
- Click submit () at the top of the page to send the request to the MTO. NOTE: If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click the link to return to the eform pages and complete each page.

Components for MTO - Receiving Materials - Initial

Current Submission				
Form/Document Name	Edit	Status	Upload	Remove
Receiving Materials Request Form Material Transfer Request Form test document		Completed		Mandatory
		Completed		

[Add Institution Forms/Supporting Documents](#)

Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc Irap@uab.edu.

Steps for Submission

Step 1. Click the edit icon () above.
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit () at the top of this page to send the request to the MTO. If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click () to return to the eform pages and complete each page.

Supporting Documents:

- Any **edited** version (such as versions with blanks completed by the UAB PI/Contact) of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}.
- Any other applicable documentation

Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:

- The Outlook email with the original, **unedited** Word version of the agreement attached.
- ALL email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

What Happens After You Submit the Request

The PI listed on the eform will receive an IRAP-generated email confirming that the submission was sent to the MTO. The submission package page is refreshed to display the routing progress. From this section you can see who the request was sent to and when they were notified of the request.

Components for MTO - Receiving Materials - Initial

Current Submission				
Form/Document Name	View	Status	Upload	Remove
Receiving Materials Request Form Material Transfer Request Form test.doc		Completed		Mandatory
		Completed		

Active Routing Progress
Open Full

Route Name	Route Type	Step Number/Name	Who	Notified	Decision
Receiving Materials-Initial	Final Review	Step 2 - Material Transfer Intake	Joy K Bruce	16-Apr-2015 3:24:40 PM	

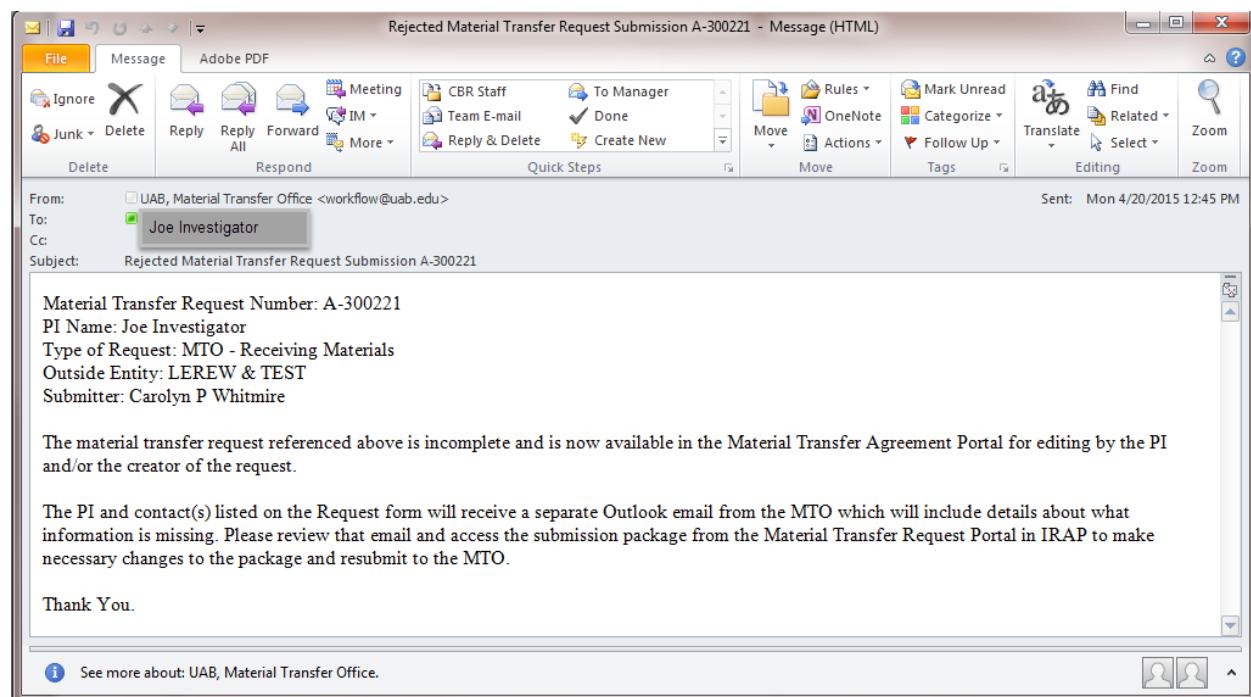
No comments have been recorded yet

The MTO reviews the submission package for all required items. If any required items are missing, the submission will be marked as rejected and returned to the UAB PI. The UAB PI will receive an IRAP-generated email. In addition, the UAB PI and their contact(s), as listed on the request form, will receive an Outlook email specifying items needed to complete the submission. Instructions for resubmitting to the MTO will also be included in the email.

Once a complete submission package is received by the MTO, the requested transfer of material(s) will be evaluated by the UAB Research Foundation (RF). If approved for processing, the MTO will initiate its review process. When revisions are required to the submitted MTA, the UAB PI and their contact(s) will receive an email requiring approval of the finalized obligations and restrictions. The final agreement will NOT be executed until the MTO receives a responding email from the UAB PI or their contact(s). Failure to respond to the email within 30 days will result in withdrawal of the request.

7. Resolving Rejected Submissions

If a submission is rejected by the MTO, the PI will receive an IRAP-generated email notice (see below). In addition, the MTO Coordinator will send a more detailed Outlook email to the PI and Contact(s) listed on the request form.



The PI listed on the eform, along with the Creator of the request, will see the request in their portal in an editable version with a status of *Rejected Submission; Returned to PI*. Either the PI or the Creator of the request can make edits to the form and the submission package and submit to the MTO.

processing status of each request or you can visit the MTO eReports for more details about processing status. Requests submitted to the MTO using the paper request forms are not visible from this portal; however, information about those requests is still available by accessing the MTO eReports.

To create a new request, select the type of request from the drop-down list below and click Create. You will be directed to the submission package for your material transfer request.

Material transfer requests can be withdrawn by the PI or the creator of the request while in a status of "Under Development". If a submission should be withdrawn while in any other status please contact the MTO at mto@uab.edu. Include the Agreement ID and the reason for withdrawal in the email.

 Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc irap@uab.edu.

Choose Type of Material Transfer Request :

Receiving Materials: Incoming Materials
Sending Materials: Outgoing Materials
Mutual Exchange: Material(s) are going in each direction

Processing

Records Found: 5.

Agreement ID	Agreement	Submission	Date Created	Date Modified	Status	Open	Remove
A-300554 - 00	MTO - Receiving Materials	Initial	14-Aug-2015	14-Aug-2015	MT Request Submitted to Route		
A-300535 - 00	MTO - Receiving Materials	Initial	14-Aug-2015	14-Aug-2015	MT Submission Received		
A-300534 - 00	MTO - Receiving Materials	Initial	14-Aug-2015	14-Aug-2015	Rejected Submission; Returned to PI		
A-300431 - 00	MTO - Receiving Materials	Initial	12-Jun-2015	12-Jun-2015	Under Development *		
A-300368 - 00	MTO - Receiving Materials	Initial	01-Jun-2015	02-Jun-2015	MT Awaiting Clarification/Additional Information/Advice		

Executed

0 Records to Display

Withdrawn

0 Records to Display

8. Receiving Materials Request Form

Please note that in order to show the branching logic that is available in the form some of the questions have been answered.

A-300565
Agreement Items

Components for MTO - Receiving Materials - Initial

Submit 

Current Submission				
Edit	Status	Upload	Remove	Submitter Comments
	Incomplete		Mandatory	

Add Institution Forms/Supporting Documents

 Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to Askit@uab.edu and cc Irap@uab.edu.

Steps for Submission

Step 1. Click the edit icon  above.
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit  at the top of this page to send the request to the MTO. 'If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click  to return to the eform pages and complete each page.

Supporting Documents:

- Any **edited** version (such as versions with blanks completed by the UAB PI/Contact) of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}
- Any other applicable documentation

Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:

- The Outlook email with the original, **unedited** Word version of the agreement attached.
- ALL** email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

A-300227

General Instructions
Page 1. Provider/Recipient Details
Page 2. Materials (0)
Page 3. General Information

General Instructions

Please Read Before Proceeding

Full disclosure of the information requested facilitates timely processing of this request

To navigate from page to page through the form click on the page name on the left side of this page e.g. 

The green checkmarks over the folder on each page  indicate that the page has been completed. Click 'Done'  in the upper left corner of the page to return to the submission package to upload supporting documents and submit your request to the MTO.

IMPORTANT REMINDER: Additional University obligations and/or authorizations with regard to certain materials (such as materials that are to be used in human subjects, hazardous materials, animals, genetically altered biological materials, etc.) may apply.

Receiving Materials: Page 1. Provider/Recipient Details

1. Providing Institution/Entity Name:

2. If this is an Addgene order, provide the Addgene order number below.

3. Providing Institution/Entity PI and Other Contacts:

Name (last, first)	Contact Type	Email Address	Phone (w/area code)

4. UAB PI and Contact Person (*only one person should be designated as a lead PI*):

Lead PI	Name	Department

- a. If this request is for an incoming PI, leave your name listed as the PI in question #4 and provide more details about the incoming PI in the table below.

PI Name	PI's Current Institution	PI's Contact Number	PI's Current Email	BlazerID (if applicable)	Anticipated UAB Hire Date

5. Have you consulted or corresponded with the Material Transfer Office about this request?

Yes No

If Yes, provide answer to (a)

- a. Provide the name of the person with whom you spoke.

Receiving Materials: Page 2. Materials

Add Materials

Add a material by clicking [Here](#)

Add New Material

ID:	Automatically Generated
Title:	
Description:	N/A
<input type="button" value="Add"/>	

• Title : Enter the full scientific name of the material and, if applicable, catalog number
• Description: Use this field to add an additional description of the material, if needed, otherwise type N/A
• Click Add to save your entry and display the materials detail page.

Receiving Materials: Page 2A. Materials Detail

1. Title of Material

2. Material Description

3. Select the type of Material from the list below. If the type of Material is not in the list, select 'Other' and provide further explanation about the type of Material.

	Animal (Including Zygotes, Gametes and Embryos) - provide answer to (b)
	Antibody - provide answer to (c), (d), (e), (f)
	Cell Line - provide answer to (c), (d), (e), (f)
	Compound - provide answer to (d), (e), (f)
	DNA/RNA - provide answer to (c), (d), (e), (f)
	Other - provide answer to (a), (c), (d), (e), (f)
	Plasmid - provide answer to (d), (e), (f)
	Tissue or Biofluid - provide answer to (c), (d), (e), (f)

- a. Specify the type of material.

- b. Is the Material(s) a living animal?

Yes No

If Yes, provide answer to (i), (ii)

- i. Do the animals (including their germ cells or embryos) being acquired have one or more genes that have been (1) transferred from another species or (2) made inoperative by human intervention (e.g. knockout, knockin, transgenic, etc.)?

Yes No

If Yes, provide answer to (1)

1. Will these animals be bred to animals at UAB other than their own breed/strain?

Yes No

- ii. Are these animals (including their germ cells or embryos) being acquired for the purpose of introducing (by any method) recombinant or synthetic nucleic acid molecules into them?

Yes No

c. Is the Material(s) of human origin?

Yes No

d. Will the Material(s) be used in humans?

Yes No

e. Will the Material(s) be combined with material of human origin?

Yes No

f. Will the Material(s) be used in living animals?

Yes No

4. Quantity and unit of measurement for the Material(s) (e.g. 100 milliliters, 2 breeding pairs, unknown, etc)

5. Does the Material fall into one of the following categories?

Yes No

- Carcinogenic, mutagenic, or teratogenic chemicals
- Controlled drugs (Controlled Substances Act Schedules V-I), investigational compounds, or nanoparticles;
- Toxins or toxic products; Radioisotopes;
- Microbial agents capable of causing disease in healthy human adults (Risk Group 2 and above); Recombinant bacteria or recombinant viruses;
- Genetic elements encoding for increased virulence; or
- Any Materials on the Chemical Facility Anti-Terrorism Standards (CFATS) list.
- Vectors for Molecular Biology (Including Plasmids, Viral Vectors, Cosmids, Artificial Chromosomes)

6. Is the Material(s) the subject of or referenced publication?

Yes No

If Yes, provide answer to (a)

a. Include a publication reference

7. Is the Material a select agent or toxin covered under the National Select Agent Registry or a Dual Use Research of Concern (DURC)?

Yes No

8. If the use of this material is described in a protocol submitted to OIRB, provide the protocol number assigned by the OIRB in the space below.

Receiving Materials: Page 3. General Information

1. Provide a brief description of the research in which the Material(s) will be used.

2. Will your research require the Material(s) to be modified in any manner? (Examples of modification include, but are not limited to, crossbreeding animals, inserting/deleting portions of plasmids, transfecting cell lines etc.)

Yes No

If Yes, provide answer to (a)

- a. Explain how the Material(s) will be modified.

3. Will the Material(s) be used in any research for which an invention disclosure has been/will be filed or commingled with any material for which an invention disclosure has been/will be filed?

Yes No

If Yes, provide answer to (a)

- a. Provide the Intellectual Property Disclosure(IPD) number(s) or, if not filed with UABRF, provide the institution name where the IPD was filed.

IPD Number

4. Is there a probability that any patentable or commercial inventions, discoveries, new uses, etc., will result from the use of the Material(s)?

Yes No

If Yes, provide answer to (a)

- a. Provide a brief description of the anticipated invention or new use.

5. Will the requested Material(s) be used, commingled, or crossbred with any Material(s) obtained from outside your lab, including Material(s) that were obtained from another institution, another UAB scientist or purchased from a vendor? If yes, include a copy of the related agreement as a supporting document when you return to the submission page.

Yes No

If Yes, provide answer to (a)

- a. Provide the name of the other Material(s), the provider and type of agreement under which the material was acquired, i.e. MTA, purchase agreement, subcontract, or any other type of conditions of use.

Name of Material	Provider of Material	Type of agreement for outside material (i.e. MTA, purchase agreement, subcontract, etc.)

6. Are there alternative sources from which the requested Material(s) may be obtained?

Yes No

If Yes, provide answer to (a)

- a. Identify each alternative source and indicate why each source was not utilized.

Source/Provider	Why was this source not selected?

7. Will you be receiving confidential information along with the Material, or if the Material(s) is of human origin, will any identifying information be included?

Yes No

8. List all sources of funding which will be used to pay for the research in which the Material will be utilized.

Type of Funding (Extramural or Internal/Departmental)	Source of Funding, if internal/dept funding	Sponsor Name, if extramural funding	OSP Assigned #, if extramural funding

9. Does the UAB PI receiving the Material(s) under the request approve of the obligations and restrictions placed on the Material(s) by the providing entity? If no, a text box will be provided below for you to document your concerns.

Yes No

If Yes, read the remainder on (b); if No, provide answer to (a)

- a. If no, please specify.

- b. **REMINDER: Restrictions or obligations you have agreed to may impact your ability to use, publish or share this material in future.**

10. Is there any additional information regarding this request that the MTO should know?

9. Sending Material Request Form

Please note that in order to show the branching logic that is available in the form some of the questions have been answered.

A-300566

Agreement Items

Components for MTO - Sending Materials - Initial

Submit 

Current Submission				
Edit	Status	Upload	Remove	Submitter Comments
	Incomplete			

Add Institution Forms/Supporting Documents

 Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to AskIT@uab.edu and cc Irap@uab.edu.

Steps for Submission

Step 1. Click the edit icon  above.
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit  at the top of this page to send the request to the MTO. If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click  to return to the eform pages and complete each page.

Supporting Documents:

- Any edited version {such as versions with blanks completed by the UAB PI/Contact} of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}
- Any other applicable documentation

Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:

- The Outlook email with the original, unedited Word version of the agreement attached.
- ALL** email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

A-300228

General Instructions

Page 1. Provider/Recipient Information

Page 2. Materials (1)

Page 3. General Information

Please Read Before Proceeding

Full disclosure of the information requested will facilitate timely processing of this request. Inaccurate or incomplete responses to the questions will result in processing delays.

To navigate from page to page through the form click on the page name on the left side of this page e.g. 

Figure 1.0 - Form Navigation

After "completing" all pages of the request form, as noted by green checkmarks over the folder on each page() click 'Done'  in the upper left corner of the page to return to the submission package where you will have to upload supporting documents and submit your request to the MTO.

IMPORTANT REMINDER: Additional University obligations and/or authorizations with regard to certain materials (such as materials that are to be used in human subjects, hazardous materials, animals, etc.) may apply.

Sending Materials: Page 1. Provider/Recipient Details

6. Recipient Institution/Entity Name:

7. Recipient Institution/Entity PI and Other Contacts:

Name (last, first)	Contact Type	Email Address	Phone (w/area code)

8. UAB PI and Contact Person (*only one person should be designated as a lead PI*):

Lead PI	Name	Department

9. Have you consulted or corresponded with the Material Transfer Office about this request?

Yes No

If Yes, provide answer to (a)

- a. Provide the name of the person with whom you spoke.

Sending Materials: Page 2. Materials

Add Materials

Add a material by clicking [Here](#)

Add New Material

ID:	Automatically Generated
Title:	<input type="text"/>
Description:	N/A

• Title : Enter the full scientific name of the material and, if applicable, catalog number
• Description: Use this field to add an additional description of the material, if needed; otherwise type N/A
• Click Add to save your entry and display the materials detail page.

Sending Materials: Page 2A. Materials Detail

1. Title of Material

2. Material Description

3. Select the type of Material from the list below. If the type of Material is not in the list, select 'Other' and provide further explanation about the type of Material.

	Animal (Including Zygotes, Gametes and Embryos) - provide answer to (b)
	Antibody - provide answer to (c)
	Cell Line - provide answer to (c)
	Compound
	DNA/RNA - provide answer to (c)
	Other - provide answer to (a), (c)
	Plasmid
	Tissue or Biofluid - provide answer to (c)

- a. Specify the type of material.

- b. Is the Material(s) a living animal?

Yes No

- c. Is the Material(s) of human origin?

Yes No

4. Quantity and unit of measurement for the Material(s) (e.g. 100 milliliters, 2 breeding pairs, unknown, etc)

5. Has the Material(s) been referenced in a publication?

Yes No

If Yes, provide answer to (a)

- a. Include a publication reference

6. Did you (the UAB PI) create or collect the Material(s)?

Yes No

If Yes, provide answer to (a); if No, provide answer to (b)

- a. Were you employed by UAB at the time of creation or collection?

Yes No

If No, provide answer to (i)

- i. Where were you employed?

- b. Provide details about how the Material was obtained.

Source	Legal document/mechanism (i.e. MTA, terms/conditions, etc.)	MTA number, if applicable

7. Does the Material incorporate material acquired elsewhere, such as a cell line transfected with a gene, a mouse crossbred with another mouse line, a modified plasmid, etc.?

Yes No

If Yes, provide answer to (a)

- a. Provide details about the other Materials

Material Name	From where was it acquired	Type of Agreement	MTA number, if applicable

8. Is the Material(s) included in an invention disclosure which has been or will be filed?

Yes No

If Yes, provide answer to (a)

- a. Provide the IPD Number or the Institution Name if Not Filed at UAB.

UABRF IPD number or institution name if not filed with UABRF

9. Will you require the recipient to reimburse UAB for costs associated with the preparation, shipping and handling of the Material(s)?

Yes No

If Yes, provide answer to (a)

- a. Provide the amount to be reimbursed for incorporation into the agreement. Be aware that in calculating the costs, the amount should not exceed costs associated with preparation, storage, shipping, distribution and handling.

--

10. If the distribution of this Material is described in a protocol submitted to the OIRB, provide the protocol number assigned by the OIRB in the space below.

--

Sending Materials: Page 3. General Information

1. Will you be providing information along with the Material (s)?

Yes No

If Yes, provide answer to (a)

- a. Is the information considered confidential or does it include identifiers for human subjects?

Yes No

2. Will the Material(s) be received by an entity or person outside of the United States, or used by a foreign national in the United States?

Yes No

If Yes, provide answer to (a), (b)

- a. Provide a brief description of the research in which the Recipient PI will use the Material(s) (this is required by Export Control Regulations).

- b. What country or, if a foreign national, country of origin?

3. List all funding sources used to create or collect the Material(s).

Type of Funding (Extramural or Internal/Departmental)	Source of Funding, if internal/dept funding	Sponsor Name, if extramural funding	OSP Assigned #, if extramural funding

4. Identify the type of Institution/Entity receiving the Material.

For Profit
Multiple Entities/Types
Not for Profit

5. Is there any additional information regarding this request that the MTO should know?

10. Mutual Exchange Request Form

Please note that in order to show the branching logic that is available in the form some of the questions have been answered.

A-300567

Agreement Items

Components for MTO - Mutual Exchange - Initial

Submit 

Current Submission

Form/Document Name	Edit	Status	Upload	Remove	Submitter Comments
Mutual Exchange Request Form Material Transfer Request Form		Incomplete			

[Add Institution Forms/Supporting Documents](#)

 Please direct all inquiries about content of the eform to the mto@uab.edu or 934-4591. If you experience any technical or system issues with using IRAP or the eform, please send an email to ASKIT@uab.edu and cc Irap@uab.edu.

Steps for Submission

Step 1. Click the edit icon  above.
Step 2. After you complete all pages of the form, you will return to this page to upload required supporting documents. To upload supporting documents click the 'Add Institution Forms/Supporting Documents' link above.
Step 3. Click submit  at the top of this page to send the request to the MTO. If the status of the eform is "Incomplete", the eform cannot be submitted and an error will be returned. Click  to return to the eform pages and complete each page.

Supporting Documents:

- Any **edited** version {such as versions with blanks completed by the UAB PI/Contact} of the receiving materials agreement should be uploaded in Word format - for Receiving Materials only.
- Please do not submit your request to the MTO until you have received the MTA template from the providing institution - for Receiving Materials only.
- A copy of related grant/contract {only if the project is NOT in IRAP}
- Any other applicable documentation

Supporting Emails - Forward to mto@uab.edu and include the agreement number (located at the top of this package e.g. A-300001) in the subject line of the email:

- The Outlook email with the original, **unedited** Word version of the agreement attached.
- ALL** email communications between the UAB PI/Contact and the external entity, and with the UAB MTO personnel regarding this request.

A-300564

General Instructions

Page 1. General Instructions

Page 2. Provider/Recipient Details

Page 3. General Information for Material Being Received

Page 4. General Information for Material Being Sent

General Instructions

Please Read Before Proceeding

Full disclosure of the information requested will facilitate timely processing of this request. Inaccurate or incomplete responses to the questions will result in processing delays.

To navigate from page to page through the form click on the page name on the left side of this page e.g. 



Figure 1.0 - Form Navigation

After "completing" all pages of the request form, as noted by green checkmarks over the folder on each page , click 'Done'  in the upper left corner of the page to return to the submission package to upload supporting documents and submit your request to the MTO.

IMPORTANT REMINDER: Additional University obligations and/or authorizations with regard to certain materials (such as materials that are to be used in human subjects, hazardous materials, animals, etc.) may apply.

Mutual Exchange: Page 1. Provider/Recipient Details

1. Providing Institution/Entity Name:

2. Providing Institution/Entity PI and Other Contacts:

Name (last, first)	Contact Type	Email Address	Phone (w/area code)

3. UAB PI and Contact Person (only one person should be designated as a lead PI):

Lead PI	Name	Department

- a. If this request is for an incoming PI, leave your name listed as the PI in question #3 and provide more details about the incoming PI in the table below.

PI Name	PI's Current Institution	PI's Contact Number	PI's Current Email	BlazerID (if applicable)	Anticipated UAB Hire Date

4. Prior to completing this request, have you consulted or corresponded with the Material Transfer Office about this specific request?

Yes No

If Yes, provide answer to (a)

- a. Provide the name of the person with whom you spoke.

Mutual Exchange: Page 2. Materials

Add Materials

Add a material by clicking [Here](#)

Add New Material

ID:	Automatically Generated
Title:	
Description:	N/A
<input type="button" value="Add"/>	

• Title : Enter the full scientific name of the material and, if applicable, catalog number
• Description: Use this field to add an additional description of the material, if needed, otherwise type N/A
• Click Add to save your entry and display the materials detail page.

Mutual Exchange: Page 2A. Materials Detail

1. Title of Material

2. Material Description

3. Are you sending or receiving the material?

	Receiving – provide answer to (4) - (6), (12) - (14)
	Sending – provide answer to (7) - (14)

4. Select the type of Material from the list below. If the type of Material is not in the list, select 'Other' and provide further explanation about the type of Material.

	Animal (Including Zygotes, Gametes and Embryos) - provide answer to (b)
	Antibody - provide answer to (c), (d), (e), (f)
	Cell Line - provide answer to (c), (d), (e), (f)
	Compound - provide answer to (d), (e), (f)
	DNA/RNA - provide answer to (c), (d), (e), (f)
	Other - provide answer to (a), (c), (d), (e), (f)
	Plasmid - provide answer to (d), (e), (f)
	Tissue or Biofluid - provide answer to (c), (d), (e), (f)

- a. Specify the type of material.

- b. Is the Material(s) a living animal?

Yes No

If Yes, provide answer to (i), (ii)

- i. Do the animals (including their germ cells or embryos) being acquired have one or more genes that have been (1) transferred from another species or (2) made inoperative by human intervention (e.g. knockout, knockin, transgenic, etc.)?

Yes No

If Yes, provide answer to (1)

1. Will these animals be bred to animals at UAB other than their own breed/strain?

Yes No

ii. Are these animals (including their germ cells or embryos) being acquired for the purpose of introducing (by any method) recombinant or synthetic nucleic acid molecules into them?

Yes No

c. Is the Material(s) of human origin?

Yes No

d. Will the Material(s) be used in humans?

Yes No

e. Will the Material(s) be combined with material of human origin?

Yes No

f. Will the Material(s) be used in living animals?

Yes No

5. Does the Material fall into one of the following categories?

Yes No

- Carcinogenic, mutagenic, or teratogenic chemicals
- Controlled drugs (Controlled Substances Act Schedules V-I), investigational compounds, or nanoparticles;
- Toxins or toxic products; Radioisotopes;
- Microbial agents capable of causing disease in healthy human adults (Risk Group 2 and above); Recombinant bacteria or recombinant viruses;
- Genetic elements encoding for increased virulence; or
- Any Materials on the Chemical Facility Anti-Terrorism Standards (CFATS) list.
- Vectors for Molecular Biology (Including Plasmids, Viral Vectors, Cosmids, Artificial Chromosomes)

6. Is the Material a select agent or toxin covered under the National Select Agent Registry or a Dual Use Research of Concern (DURC)?

Yes No

7. Select the type of Material from the list below. If the type of Material is not in the list, select 'Other' and provide further explanation about the type of Material.

	Animal (Including Zygotes, Gametes and Embryos) - provide answer to (b)
	Antibody - provide answer to (c)
	Cell Line - provide answer to (c)
	Compound
	DNA/RNA - provide answer to (c)
	Other - provide answer to (a), (c)
	Plasmid
	Tissue or Biofluid - provide answer to (c)

a. Specify the type of material.

--

b. Is the Material(s) a living animal?

Yes No

c. Is the Material(s) of human origin?

Yes No

8. Did you (the UAB PI) create or collect the Material(s)?

Yes No

If Yes, provide answer to (a); if No, provide answer to (b)

a. Were you employed by UAB at the time of creation or collection?

Yes No

If No, provide answer to (i)

i. Where were you employed?

--

b. Provide details about how the Material was obtained.

Source	Legal document/mechanism (i.e. MTA, terms/conditions, etc.)	MTA number, if applicable

9. Does the Material incorporate material acquired elsewhere, such as a cell line transfected with a gene, a mouse crossbred with another mouse line, a modified plasmid, etc.?

Yes No

If Yes, provide answer to (a)

a. Provide details about the other Materials

Material Name	From where was it acquired	Type of Agreement	MTA number, if applicable

10. Is the Material(s) included in an invention disclosure which has been or will be filed?

Yes No

If Yes, provide answer to (a)

a. Provide the IPD Number or the Institution Name if Not Filed at UAB.

UABRF IPD number or institution name if not filed with UABRF

--

11. Will you require the recipient to reimburse UAB for costs associated with the preparation, shipping and handling of the Material(s)?

Yes No

If Yes, provide answer to (a)

- a. Provide the amount to be reimbursed for incorporation into the agreement. Be aware that in calculating the costs, the amount should not exceed costs associated with preparation, storage, shipping, distribution and handling.

12. Quantity and unit of measurement for the Material(s) (e.g. 100 milliliters, 2 breeding pairs, unknown, etc)

13. Is the Material(s) the subject of or referenced publication?

Yes No

If Yes, provide answer to (a)

- a. Include a publication reference

14. If the use of this material is described in a protocol submitted to OIRB, provide the protocol number assigned by the OIRB in the space below.

Mutual Exchange: Page 3. General Information For Materials Being Received

1. Provide a brief description of the research in which the Material(s) will be used.

2. Will your research require the Material(s) to be modified in any manner? (Examples of modification include, but are not limited to, crossbreeding animals, inserting/deleting portions of plasmids, transfecting cell lines etc.)

Yes No

If Yes, provide answer to (a)

- a. Explain how the Material(s) will be modified.

3. Will the Material(s) be used in any research for which an invention disclosure has been/will be filed or commingled with any material for which an invention disclosure has been/will be filed?

Yes No

If Yes, provide answer to (a)

- a. Provide the Intellectual Property Disclosure(IPD) number(s) or, if not filed with UABRF, provide the institution name where the IPD was filed.

IPD Number

4. Is there a probability that any patentable or commercial inventions, discoveries, new uses, etc., will result from the use of the Material(s)?

Yes No

If Yes, provide answer to (a)

- a. Provide a brief description of the anticipated invention or new use.

5. Will the requested Material(s) be used, commingled, or crossbred with any Material(s) obtained from outside your lab, including Material(s) that were obtained from another institution, another UAB scientist or purchased from a vendor? If yes, include a copy of the related agreement as a supporting document when you return to the submission page.

Yes No

If Yes, provide answer to (a)

- a. Provide the name of the other Material(s), the provider and type of agreement under which the material was acquired, i.e. MTA, purchase agreement, subcontract, or any other type of conditions of use.

Name of Material	Provider of Material	Type of agreement for outside material (i.e. MTA, purchase agreement, subcontract, etc.)

6. Are there alternative sources from which the requested Material(s) may be obtained?

Yes No

If Yes, provide answer to (a)

- a. Identify each alternative source and indicate why each source was not utilized.

Source/Provider	Why was this source not selected?

7. Will you be receiving confidential information along with the Material, or if the Material(s) is of human origin, will any identifying information be included?

Yes No

8. List all sources of funding which will be used to pay for the research in which the Material will be utilized.

Type of Funding (Extramural or Internal/Departmental)	Source of Funding, if internal/dept funding	Sponsor Name, if extramural funding	OSP Assigned #, if extramural funding

9. Does the UAB PI receiving the Material(s) under the request approve of the obligations and restrictions placed on the Material(s) by the providing entity? If no, a text box will be provided below for you to document your concerns.

Yes No

If Yes, read the reminder on (b); if No, provide answer to (a)

- a. If no, please specify.

- b. REMINDER: Restrictions or obligations you have agreed to may impact your ability to use, publish or share this material in future.

10. Is there any additional information regarding this request that the MTO should know?

Mutual Exchange: Page 4. General Information For Material Being Sent

1. Will you be providing information along with the Material(s)?

Yes No

If Yes, provide answer to (a)

- a. Is the information considered confidential or does it include identifiers for human subjects?

Yes No

2. Will the Material(s) be received by an entity or person outside of the United States, or used by a foreign national in the United States?

Yes No

If Yes, provide answer to (a), (b)

- a. Provide a brief description of the research in which the Recipient PI will use the Material(s) (this is required by Export Control Regulations).

- b. What country or, if a foreign national, country of origin?

3. List all funding sources used to create or collect the Material(s).

Type of Funding (Extramural or Internal/Departmental)	Source of Funding, if internal/dept funding	Sponsor Name, if extramural funding	OSP Assigned #, if extramural funding

4. Identify the type of Institution/Entity receiving the Material.

	For Profit
	Multiple Entities/Types
	Not for Profit

5. Is there any additional information regarding this request that the MTO should know?

11. List of Icons

The following is a list of some of the more common icons you are more likely to encounter as a general user of the Material Transfer Request Portal as implemented at UAB.



Done **Done Button:** This button will exit you out of the submission package and return you to the Material Transfer Request Portal. The submission package you created and any edits you made to the request form are saved and are visible to the “creator” and PI listed on the request form.



Show **Show/Hide Help Button:** This button is visible only on certain pages of the form. Clicking this button will reveal individual rollover help buttons for each field, explaining what information is being requested. We attempted to build all instructions/guidance into the questions, so you may not find it necessary to use this feature.



Back **Back Button:** This button is located in the stationary toolbar. Like your browser’s back button, clicking this button will bring you to the previous screen or frame visited.



Save **Save Button:** This button appears in various locations. Clicking this button allows you to save the progress of your submission package or request form.



Log Out **Logout Button:** this button is located in the stationary toolbar. Clicking this button allows you to log out of the system. Use this button rather than “X-ing” out of the system to close your session.



Help **Help Button:** This button is located in various locations of IRAP. Clicking this button under My Tech Transfer and from within the submission package stationary toolbar will open the Investigator and Staff User Handbook for the Material Transfer Request Portal.



Open **Open Button:** This button is located throughout the system. Clicking this button will allow you to open and view designated items in detail.



Edit **Edit Button:** This button appears next to editable items. Clicking this button will allow you to open and edit the corresponding item.



Delete **Delete Button:** This button appears next to deletable items. Clicking this button will remove the corresponding item from the system permanently.



Upload **Upload Button:** This button appears in module components where file upload from your computer is possible. Clicking this button will lead you to an interface that allows you to browse for a file or object to upload.



View **View Button:** This button appears next to items where the user is granted view access. Clicking this button will allow you to view (not edit) the selected item.



[History](#) **History Button:** This button appears on certain screens within the InfoEd system and allows users to see what changes have occurred to the fields on the page. Please note this tool is not fully functional.



[Reminder](#) **Reminder Button:** This button appears on the submission package but is not fully functional.



[Access](#) **Access link:** This button provides a summary of the security access for the person who is logged into IRAP. The access may be specific to the module or location of IRAP where the link is located.