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	PREPARED BY: Bob Weidenbaum	APPROVED BY:
DOCUMENT TITLE: BEI Material Transfer Agreement Job Aid DEPARTMENT: IAG – Industry Agreements Group	DOCUMENT NUMBER:	EFFECTIVE DATE: December 6, 2022

Background:

BEI Resources (BEI) is a US Government funded program and is a central repository that supplies organisms and reagents to microbiology and infectious diseases researchers (PIs). BEI Resources is a non-profit repository that PIs or their lab assistants/researchers can directly contact for specific materials in their repository. Materials are available through an online catalog. There is no charge for research materials, but domestic investigators will be required to pay for shipping costs. The BEI repository manages some collections of the American Type Culture Collection or ATCC. ATCC is a nonprofit organization which collects, stores, and distributes standard reference microorganisms, cell lines and other materials for research and development.

Purpose

This job aid is to explain how Material Transfer Agreements (“MTA”) with BEI Resources are to be reviewed and processed. MTAs are processed by the Industry Agreements Group (“IAG”).

Scope

- Process

MTAs are typically managed by IAG. However, some BEI agreements are sent directly to Office of Research Integrity and Assurance (“ORIA”).
- Documents

Documents will be maintained and updated in ERA.
- Roles/ Responsibilities

IAG GCO will manage BEI Resources MTAs for ASU.

Definitions


Electronic Research Administrator (“ERA”). Electronic data base that houses all ORSPA Agreements and where MTA tasks are tracked and managed.

Grant and Contract Officer (“GCO”). Designated person at ASU for reviewing the Agreement.

Industry Agreements Group (“IAG”). IAG is the team in the Office of Research & Sponsored Projects Administration (ORSPA) that manages MTAs and industry agreements.

Internal Request Form (“IRF”). A form for the MTA where the ASU PIs will provide the required information to complete or review an MTA. The form is also used to pass information on to any necessary reviewing ASU internal parties.

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Material Transfer Agreement (“MTA”). Type of Agreement where materials are being transferred to ASU, from ASU, or both. For the purposes of this job aid, BEI Resources material is inbound to ASU.

Office of Research Integrity and Assurance (“ORIA”). Group responsible at ASU for approving the MTA for transfer from a compliance perspective.

Point of Contact (“POC”). A person or sometimes a general e-mail address for BEI who can provide information, answer questions and/or sign the MTA on behalf of BEI.

Principle Investigator (“PI”). The named researcher from ASU.

Responsibilities

The assigned GCO is responsible for reviewing and facilitating the compliance approvals for BEI MTAs.


Requirements / Steps

A. Preliminary steps / info:

1. PIs or their lab assistants/researchers work directly with BEI for ordering specific materials. The PI and/or department will need to be “registered” with ATCC for access to BEI resources. Information is available at contact@beiresources.org or by fax at (703) 365-2898.
2. Once a request is made, BEI will generally send one of two types of MTA agreements. One is an “Emergency Use Simple Letter Agreement for the Transfer of Materials related to [the specific material or a subject]” for example SARS-CoV-2. This is a short form letter. The other is an “Individual Material Transfer Agreement”. This is a longer version MTA agreement. Both agreements are generally non-negotiable, however, current terms as of this writing are standard for ASU and have been used as precedent.
3. When steps 12 below is complete, the PI or department will sign the acknowledgment section of the MTA entitled “Read and Understood by Registrant”. The PI should not sign as the “Duly Authorized Signatory for Recipient’s Institution”. IAG will process the MTA for that signature.
4. Material is furnished after the registrant and institution have executed a BEI MTA and Registrant Transfer Agreement (see steps below), and ATCC returns a fully executed copy.

B. Steps for GCO:

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- Steps to manage the task in the ERA system are similar to those in the MTA Job Aid. That job aid is available at <https://researchadmin.asu.edu/node/26975>.
- Check to see if a task is already set up in ERA. If so, there may be an Internal Request Form (IRF) already completed and uploaded.
- If GCO does not already have the Internal Request Form, send an IRF to the PI for completion. Once the PI returns the IRF to the GCO, set up an MTA task. BEI tasks are for incoming material.
- Save the MTA Internal Request Form by uploading it in the ERA task. Use the naming convention “PI Last Name_BEI Resources_MTA_IRF”. Upload it in Section 11.0 of the Agreement Task Request Page.
- Note you will be able to automatically add BEI Resources as the Sponsor/ Outside Party at 6.0.

? 6.0 * Sponsor/Outside Party:

Organization	Org Parent	Workday	Supplier ID
BEI Resources			
Beihang University			
Beijing Dream Diagnostics Medicine Technology Co., Ltd			
Beijing Hope Industry and Trade Co., Ltd			
Beijing Normal University			
Beijing Proteome Research Center (BPRC)			
Beijing Transport Institute			
Beijing Transportation Research Center, Beijing, China			
Beijing Wokun Investment Management Co., Ltd.			


Phone:

- When setting up the task, use our normal naming convention for the Brief Description in 8.0, i.e., PI Last Name_Outside Party_Type of Agreement. For example,


? 8.0 Brief Description/Project Title:

Hogue_BEI Resources_MTA

- Based upon the information in the IRF, complete all fields of the MTA Additional Information Page of the ERA Task.
- If the IRF does not contain the information necessary to complete the fields on the MTA Additional Information Page, or if the GCO has other questions, or needs additional information, reach out to the PI for the additional information. Add the updated or additional information to the MTA Additional Information Page.

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9. The GCO will then send the IRF to ORIA for their approval of all compliance matters. The e-mail will be sent to Research.Integrity@asu.edu. Use the text in the next step in the e-mail to request approval.
10. Like any other MTA, the e-mail to ORIA should read: “Research Integrity: Please find attached the MTA Internal Request Form for an MTA requested by (Insert PI’s name) between Arizona State University (ASU) and the BEI Resources for your review. Please review and confirm that all the compliance matters for the transfer have been met. Thank you, [GCO name]”
11. Once an approval e-mail is received from ORIA; 1) make any updates in ERA as requested by ORIA; and 2) upload the approval e-mail to the ERA task using the following naming convention: “PI Last Name_BEI Resources_MTA_ORIA approval”.
12. Because MTAs from BEI are generally non-negotiable, GCO may now reach out to the PI or department to sign the acknowledgment of the MTA in the section entitled “Read and Understood by Registrant” if it has not already been signed.
13. Check the MTA form to see if the particular MTA form from BEI requires the additional signature of an ASU Biosafety Officer. If so, the GCO should reach out to the ASU Biosafety Officer (Giorgio Scarpellini at Giorgio.Scarpellini@asu.edu at the time of the Effective Date of this job aid) for review and signature and copy ORIA in your e-mail. This signature is not the same as the ASU institutional signature.
14. Once signed by any required internal parties, such as the PI or Biosafety Officer, forward the BEI MTA to the appropriate institutional official who is an authorized signatory for ASU’s signature. Typically, an Assistant Director of the Office of Research & Sponsored Projects Administration (ORSPA) will sign MTAs.
15. When reaching out for signature on behalf of the institution, include the following in the request: the nature of the document (MTA); that it is a BEI Resources MTA or MTA letter; if the terms are standard or not, and if not, what non-standard terms are in the agreement; if it is a rush, conspicuously notify the signor of that fact; and finally include the link to the ERA task.
16. The ASU executed BEI MTA will then be sent to the POC at BEI or to the general e-mail address, contact@beiresources.org, with a request to fully execute the MTA and return a copy to the GCO. Once BEI receives the MTA from ASU and signs off, the materials are shipped to the requesting PI.
17. Once the MTA is fully executed and returned, complete the task in ERA as you would any other MTA. Refer to the MTA job aid for additional information.
18. On Task Summary page, click ‘Finalize Agreement’ under My Current Actions. If there are any incomplete fields, Error/Warning Messages will pop-up here. GCO will have

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option to 'Jump To' appropriate page to fix errors and provide complete information. The task Status will change to Executed/Awarded.

19. Distribute the fully executed copy of the MTA to the PI or the RA if applicable, and Contracts at Contracts@exchange.asu.edu.

References / Related Documents

- Material Transfer Agreement Job Aid at <https://researchadmin.asu.edu/node/26975>.
- American Type Culture Collection Material Transfer Agreement Job Aid at <https://researchadmin.asu.edu/node/27000>
- UBMTA (Uniform Biological Material Transfer Agreement) Job Aid at <https://researchadmin.asu.edu/node/26977>
- Addgene Material Transfer Agreement Job Aid at <https://researchadmin.asu.edu/node/27005>

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