



UT Health San Antonio Office of Technology Commercialization is pleased to introduce our new Inventor Portal.

The portal is accessible through a login from any web-enabled computer and makes it possible for each

Inventor to:

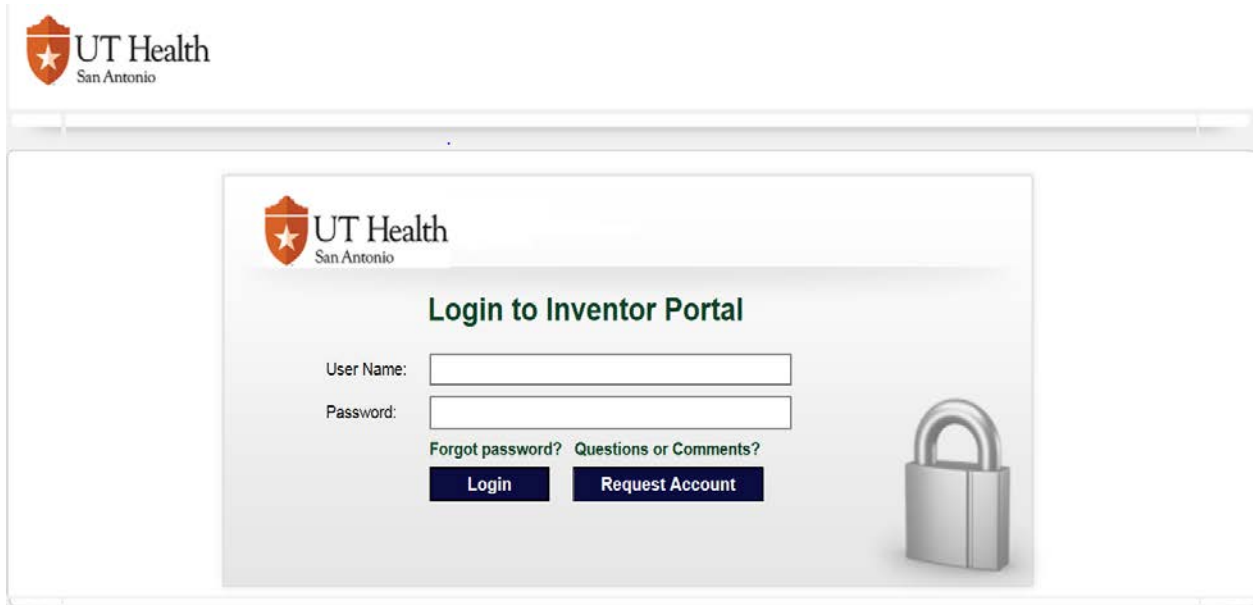
- Complete and submit invention disclosures online.
- Check the status of your invention disclosures submitted through the Inventor Portal.
- View a list of patent applications filed in relation to your invention disclosure and check status.
- View a list of agreements executed in relation to your technology.

Following is a “step by step” manual for entering data and navigating through the portal. The OTC Inventor Portal was designed to be intuitive and easy to use; however, the instruction manual should answer any further questions you may have.

If you have any questions or wish to provide suggestions to OTC for improving the portal, please contact Victor Saenz at 210-562-4028 or saenzv@uthscsa.edu.

Open a web browser using **Internet Explorer** and type:

<https://inteumweb.uthscsa.edu/InteumWeb/inventorportal/login.aspx>



UT Health
San Antonio

Login to Inventor Portal

User Name:

Password:

[Forgot password?](#) [Questions or Comments?](#)

[Login](#) [Request Account](#)

1. Your (the inventor) login is the same User Name and Password as set by UTHSCSA Information Management and Services.
2. Once the inventor logs in using their Windows credentials;
 - A. If this is the first time logging in, the inventor will be redirected to the 'Request Account' page and the inventor will need to enter an e-mail address to continue to the 'Create Account' page
 - a. If the e-mail address can be uniquely found linking to a Contact Record in Inteum, (the UTHSCSA administered invention database), the 'Create Account' page (which is similar to the profile page) will be pre-filled with data of this contact record, and the inventor can verify all the information and save the changes. If all is saved without error, the user record will be created for Inteum.
 - b. If there's no user record found for this contact, then the inventor portal user account will also be created at this point. Additionally, an e-mail notification will be sent, based on OTC designation.
 - c. If the e-mail address cannot be uniquely found in Inteum system, the inventor will need to fill out the profile and create the account.

- B. Since the portal setting is set to automatically approve portal accounts, then the inventors can use the portal immediately after they create the accounts.

Please note this is only a one time process for inventors when they log in to the portal for the very first time. After that, they will just enter their Windows credentials and password.

NOTE: Also, please note that having a UTHSCSA UserID and Password does not give you automatic access to the portal. If you are unable to login, please request an account and OTC will set up the inventor's account in our system.

3. Once logged on, the UTHSCSA Technology Transfer & Commercialization Portal home page will be displayed.

UT Health San Antonio

Logged in as: Victor Saenz
[Logout](#)
[Feedback](#)

Dashboard
Disclosures
Add New Disclosure
Edit Profile
Admin

Note: The Portal will time out after 60 minutes so SAVE YOUR WORK FREQUENTLY by selecting "Save as Draft."

All statements and information I have made or provided in this Invention Disclosure Form are true and complete to the best of my knowledge. I understand and agree that all rights, obligations and financial interest, if any, pertaining to or derived from this invention are as determined under the University Policy & Procedures Manual "Policy". I also understand and acknowledge that the University has the right to change the policy from time to time, including the percentage of net royalties paid to me. Further, I acknowledge that the percentage of net royalties paid to inventors is derived only from consideration in the form of money or equity received under: (1) a license or material transfer agreement for licensed rights; or (2) an option or letter agreement leading to a license or material transfer agreement. I also acknowledge that the percentage of net royalties paid to inventors is not derived from research funds or from any other consideration of any kind received by the University. I agree to assist the University in the evaluation, possible protection and commercialization of the invention as described in this Invention Disclosure Form.

Submitting a New Invention Disclosure through the Inventor Portal

1. Click on **"Add New Disclosure"** in the upper left-hand corner.
 - A dialog box titled **"New Disclosure"** will be displayed.
2. Enter the title, choose **"Disclosure"** as the type of Disclosure and click **"Create New Disclosure"**

New Disclosure

You are creating a new disclosure. Before you can edit your disclosure, you must first enter a title and choose the type of disclosure.

Disclosure Title:

Choose the Type of Disclosure:

Create New Disclosure [Cancel](#)

3. A new disclosure draft with the title you entered will be displayed listing you as the inventor/administrator with 100% contribution.

NOTE: As the inventor/administrator, you can edit the disclosure in the Inventor Portal; however, once the disclosure is submitted and approved, it can no longer be edited without consent from Technology Transfer & Commercialization Office. Be sure that you have thoroughly reviewed the disclosure and uploaded any attachments before submitting.

4. On the left is a list of tabs in which disclosure information may be entered. Please click on each tab and enter the appropriate information in each field.

NOTE: Fields with asterisks are required.

5. You may SAVE your disclosure at any time by clicking on “**Save as Draft**”, and return later to continue. These buttons are located at the top and bottom of the disclosed document as noted below.



Note: The Portal will time out after 60 minutes so **SAVE YOUR WORK FREQUENTLY** by selecting “**Save as Draft.**”

6. The following is a list of each tab/field to be completed in the invention disclosure process.

A screenshot of a web form. On the left, there is a "Disclosure Type:" label above a dropdown menu with "Disclosure" selected. In the center, there is a "Disclosure Title:" label above a text input field containing "Sample Disclosure". On the right, there is a yellow box with the word "Draft" in bold. Below "Draft" is the text: "This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below." At the bottom of the yellow box is a blue button with white text that says "Submit for Review".A screenshot of a web form tab titled "Inventor Information". Below the title bar, there is a label "Primary Inventor's Department" above a text input field.

Invention Related Dates

Conception of Invention

Do written records exist? (Y/N)

Details

If yes, please list the location of the written records. If no, please list the names of the individuals with whom you had discussions.

Is there experimental evidence of the invention? (Y/N)

Details

If yes, please list the location of the written records. If no, please list the names of the individuals with whom you had discussions.

Description

Confidential Description of Invention

Please describe the invention completely. Include sketches, drawings, and photographs as appropriate. Provide key data and experimental results. If available, attach a draft manuscript, PowerPoint slides, video, spreadsheets, and any additional documentation relevant to the disclosure. All attachments should be included in the Documents section below.

Appointment/Membership

Please indicate any appointments/memberships/affiliations you had at the time of the invention.

Technical Summary



Technical Summary

Please communicate a concise technical summary of the invention. Use extra space if needed and append complete descriptions (e.g. data, publications, abstracts, graphs, presentations, etc.). All attachments should be included in the Documents section below.

Advantages



What are the advantages of your invention over the current state-of-the-art?

Applications



What are the practical and commercial applications of the invention?

Development



Stage of Development


Please indicate the stage of development of your invention: (e.g. concept, early stage, bench prototype, industrial prototype, product, market, etc.)

Next Steps

Please indicate your next steps.

Additional Resources

Please indicate additional resources needed.


Limitations 

Does the invention possess disadvantages or limitations? (Y/N)

No

If yes, please describe.

How might these be overcome?

Marketing 


Marketing Targets
Please list any companies you believe are/might be interested in your invention in the Marketing Targets section below.

Outside Party Knowledge 

Have the essential elements of the invention been disclosed to anyone outside of the UTHSCSA either orally or in writing? (Y/N)

No

If yes, to whom?

Public Disclosure 


Do you intend to publicly disclose the essential elements of the invention in the future, either orally or in writing? (Y/N)

No


If yes, please list how. (e.g. publication, thesis/dissertation, seminar, poster, meeting, abstract, webpage, etc.)

Funding Sources 

Funding Sources
Please list any outside funding sources in the Funding section below. Please be sure to include the Grant or Account number.

Materials 


Did this invention utilize data or materials from any of the following?

MTA (Material Transfer Agreement) 


If others, please list.

NOTE: The Material's question has a drop down list of choices. Among the choices are:


1. MTA (Material Transfer Agreement)
2. CRADA/SBIR/STTR
3. Biological Materials (e. g. human blood, tissues, or cell lines)
4. Cancer Therapy & Reseach Center (CTRC)
5. Others

Students 

Please list any inventors who were students at the UTHSCSA during the conception and development of the invention. (list names)

Colleagues 

Please list any colleagues on campus who are knowledgeable about the work and its potential impact. (list names)

External Researchers 

Please list external researcher(s)/competitor(s) who work in the field(s) related to this disclosure.

Non-confidential Summary

Commercial Summary

Please provide a non-confidential, simple, and commercially applicable summary of the invention. This will be useful for marketing purposes; include advantages, characteristics, and industry applications. All attachments should be included in the Documents section below.

Inventors

Inventors

Please list any additional inventors in the Inventors section below.

Remarks

By	Comment	Created
No remarks to display.		

Add a Remark

Save Remark

NOTE: The question regarding remarks allows you to enter remarks to OTC. The OTC Business Manager may also enter remarks in return. After you have submitted your invention disclosure, if you haven't heard from OTC within 24 hours, please log back in and check the remarks section of your invention disclosure.

Agreements

Agreement ID	Title	Party	Type	Status	Effective From	Status Updated
No agreements to display.						

Documents

Uploaded By	File	Extension	Created	Manage
No documents to display.				

Add a Document

No file chosen

Upload Document

NOTE: The question regarding documents allows you to upload any sketches, drawings, and photographs as appropriate. If available, attach a draft manuscript, PowerPoint slides, video, spreadsheets, and any additional documentation relevant to the disclosure. All attachments should be included in the Documents section of the disclosure.

Subscribers ⌵

First	Last	Email	Type	Manage
Inventor	Portal		User	Creator of this Disclosure

Add a Subscriber
 Subscribers do not need to be users of Inventor Portal. Add individuals that you would like to be notified by email of events and actions that take place for this disclosure.

First Name: Last Name: Email Address:

Add Subscriber

Inventors ⌵

Add Inventor

First	Last	Role	Significance	Contribution	Manage
Inventor	Portal	Administrator	1	100.00%	Edit Delete

NOTE: The question regarding inventors allows you to enter additional inventors and their percent contribution to the invention.

1. Select the **“Inventors”** tab to add additional inventors.

NOTE: You will need to adjust the **“Contribution”** level in your own record before designating a level for additional inventors as the contribution cannot exceed 100%.

2. Inventor’s Disclosure Role & Rights (Required): Designate each inventor as either **“Administrator”** or **“View Only.”** Administrators can view and edit the disclosure prior to submission. View Only allows viewing of the disclosure and adding remarks and documents.
3. Find Inventor by Last Name: Search for each inventor by entering their last name in the **“Find Inventor”** field. Possible choices will be displayed below in a drop-down box. If no choices are found, click **“Add a New Contact,”** and complete the fields as prompted. Remember to **“Save changes.”**

Add Inventor ✕

Inventor's Disclosure Role and Rights: *

Administrator
Full control over this disclosure.

View Only
Can only add remarks and view this disclosure.

Find Contact by Last Name or First Name: **Search**

Significance: *

Contribution %:

Save Changes [Close](#)

Interests ⌵

Add Interest

Interest	Manage
No interests to display.	

Marketing Targets ⌵

Add Marketing Target

Company	Contact	Email	Created	Manage
No marketing targets to display.				

Funding ⌵

Add Funding

Funding Institution	Investigator	Grant / Contract No.	Created	Manage
No funding to display.				

Patents ⌵

Application No.	Patent No.	Internal ID	Title	Country	Application Type	Status	Date Filed	Date Issued	Status Updated
No patents to display.									

Save As Draft **Download As PDF**

Editing a Draft Invention Disclosure

If you do not have time to complete an invention disclosure, you can save it as a draft and work on it later.

- In the “**Manage**” column of “**Disclosures**,” click “**Edit**” to open and add additional information to the disclosure.

Submitting Your Invention Disclosure

Once you have completed entering your invention disclosure data:

1. Select “**Download as PDF**” in the upper right-hand corner.

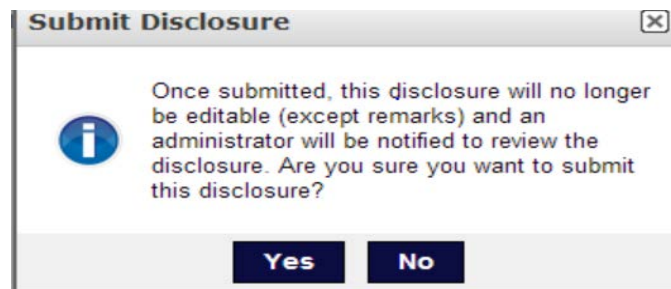
The screenshot shows a web interface for an invention disclosure. At the top, there is a dark green header with the word "Disclosure" in white. Below the header, there are two buttons: "Save As Draft" and "Download As PDF". A green notification bar with a checkmark icon says "Changes saved successfully!". The form has two main sections: "Disclosure Type:" with a dropdown menu showing "Disclosure", and "Disclosure Title:" with a text input field containing "Sample Disclosure". On the right side, there is a yellow box with the heading "Draft" and the text: "This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below." Below this text are two buttons: "Save As Draft" (a blue link) and "Submit for Review" (a dark blue button).

2. Print out a copy, fill out the information on the final page and obtain signatures from all UTHSCSA inventors.
3. Upload the fully-signed signature page using the “Upload Documents” tab.
4. Select “Submit for Review”.

NOTE: Be sure that you have thoroughly reviewed the disclosure and uploaded any attachments before submitting. Once the disclosure is submitted and approved, it can no longer be edited without consent from Technology Transfer & Commercialization Office. If you need to make changes after submission, contact OTC at 210-562-4028 or Saenzv@uthscsa.edu.

5. If you have missed entering data in any required areas of the invention disclosure, you will see an error message displaying the field(s) that need to be corrected.

6. If all required areas have been completed, you will see this message:



7. If you are ready to submit, click the “**Yes**” button to submit this disclosure for review.”
8. Once the invention disclosure has been submitted, the status in the “**Disclosures**” list will be updated to “**Submitted.**” The disclosure is no longer editable; however, you can View, Print a PDF, and add remarks.

What Happens Next?

After the disclosure has been submitted, OTC personnel will review your submission to ensure that it is complete, and that all the required information has been supplied. Approved submissions are assigned an ID number and updated with an “Review Stage” status which means that your disclosure is complete and has been assigned to a Business Manager for technical review.

You may continue to log into the Inventor Portal to monitor the status of your inventions, communicate with commercialization associates, and update your contact information. Keeping your email address current in the Inventor Portal ensures effective communication.

As patent, copyright or trademark applications are filed and/or agreements executed, you will be able to see the information under the Patents and Agreements.