iEdison User Guide for Administrators

System Version 4.13.4.1

Document Version 1.2.0

March 01, 2016

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No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

DOCUMENT HISTORY

Date	System Version	Document Version	Description of Change	Author
6/3/2014	v4.1.2.7	v1.0.0	Initial document created from Flare online help	eRA Communications
6/1/2015	v4.7.0.11	v1.1.0	Updated for the system releases from July 2014 to April 2015	eRA Communications
3/01/2016	v4.13.4.1	v1.2.0	Updated for the January ER release and the February out-of-cycle release.	eRA Communications

The most current version of this document will be available on the eRA website: http://era.nih.gov.

IMPORTANT: Did you know the information in this user guide is available as online help, too? Access the iEdison Online Help directly at https://era.nih.gov/eraHelp/iEdison_Admin or click the '?' icon anywhere within iEdison for help specific to that screen.

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1 Introduction

To comply with the Bayh-Dole Act, grantees and contractors who have inventions resulting from their federally financed work performed by their employees (e.g., Principal Investigators and/or other key personnel) must report those inventions. Additionally, they must report specific information to the Federal government within limited times on their efforts at achieving practical application of their inventions, including their decision whether or not to retain ownership of their invention(s) and whether or not to file for patent protection. iEdison not only provides the means for secure invention reporting and data delivery, it performs validation checks on that data (e.g., funding agreement numbers), and reminds users of any additional information that may be needed and when – through email reminders and on-screen notification messages. It also allows organizations with in-house databases to securely upload their information to iEdison and to download their data (e.g., for periodic reconciliation) from the iEdison database at any time. iEdison is used by approximately 30 Federal agency offices for inventions and patent reporting.

1.1 User Roles

Here are the iEdison user roles and their description.

Role	Description
Inventor	The Inventor account type is created for an individual to continue reporting on an invention when an inventor waiver request has been approved. Inventors can create patent reports and create utilization reports for an invention, but cannot create new invention reports because they are not parties to a funding agreement for the performance of research work.
TTO Administrator	The TTO (Technology Transfer Office) account type supports the Technology Transfer/Licensing Office or Office of Research and Development at the extramural organization. This user can submit inventions, patents, and utilization reports, and request waivers. The TTO Administrator also has the ability to create iEdison accounts.
TTO User	The TTO (Technology Transfer Office) account type supports the Technology Transfer/Licensing Office or Office of Research and Development at the extramural organization. This user can submit inventions, patents, and utilization reports, and request waivers.

Table 1: iEdison User Roles

1.2 Accessing iEdison and Other System Information

1.2.1 Special Notes Regarding the Web Browser

iEdison is a web-based application. Any registered user with a compatible web browser (Internet Explorer 7.0 or Firefox 26.0 or greater) on a PC or Macintosh and Internet access can log in. Other web browsers are also supported, but some functionality may be lost.

Please use the navigation buttons and hyperlinks provided in the iEdison interface instead of the browser buttons to move through the system screens. Please use the banner links instead of the back button or pressing the delete or backspace keys without a field selected.

1.2.2 Logging into the System

To log in to the iEdison system, a user account is needed. As part of registering to use iEdison a unique username and password are created. The username and password can be any combination of letters and numbers and each must be between six to twenty characters.

NOTE: If your password is forgotten, first contact the iEdison accounts administrator at your organization. Any individual with a TTO Administrator role is able to reset the password for users within their organization. After the password has been changed, an email notification is sent informing you of a new temporary password. You are required to change the password when you log in using your temporary password.

To login to the iEdison system:

1. Navigate your browser to https://s-edison.info.nih.gov/iEdison.
2. Enter your **Username** and **Password** in the fields provided.
3. Click the **Submit** button to open a new iEdison session.

iEdison.gov

About | Help

Log in to your secure account: All fields marked with an asterisk (*) are required.

Login

Login

User Name

Password

Login Cancel

Forgot Password/Unlock Account?

Register Institution to use iEdison

System Notification

iEdison 4.00.00

Welcome to iEdison

iEdison (which stands for Interagency Edison) helps government grantees and contractors comply with a federal law, the Bayh-Dole Act. Bayh-Dole regulations require that government funded inventions be reported to the federal agency who made the award.

iEdison is interagency because it provides a single interface for grantees and contractors to interact with any participating agency.

iEdison makes it easy to learn about the law and its regulations and report an invention or patent funded by any of the agencies listed on the right.

iEdison Overview

What's New

Bayh-Dole Act (37 CFR 401)

Invention reporting Tips

Frequently-Asked Questions

IEdison is used for invention and patent reporting by the following agency offices

AFRL/RI
AHRQ
ARMY/ARL
ARMY/ARO
ARMY/MRMC
ARMY/SMDC
ARMY/SSC
ATSDR
CDC
DHS/ST
DOC/EDA
DOC/ITA
DOD/DARPA
DOD/DMEA
DOD/DTRA
DOE
DOT
EPA
FDA
IHS
NAVY/ONR
NIH
NIST
NOAA
NRC
NSF
OTHER
USAF/AFOSR
USAF/ESC
USAID
USDA/ARS
USDA/FS
USDA/NIFA

Agency Office Contacts

For any required agency specific forms, click on the agency link.

National Institutes of Health (NIH)
9000 Rockville Pike
Bethesda, Maryland 20892

Department of Health and Human Services

FIRSTGOV Your First Click to the U.S. Government

Home | About | Help
E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice

OMB No 0925-0002 IEDISON-1000

Figure 1: iEdison Login Screen

When the **Submit** button is clicked and the login is successful, the system normally first displays the *View Notification Messages* screen.

To view the Main Menu, click the **Main Menu** tab from the navigation menu at the top of the screen.

1.2.3 Default user Preferences

The new default user preference screen is the *View Notification Messages* screen. If previously to the January 2014 the default user preference was set to *No*, the default user preference screen is the *Main Menu* screen.

1.2.4 Session Expiration (NOTE: This topic may be removed.)

For security purposes, iEdison user sessions terminate after a period of inactivity. The system attempts to display an alert prior to terminating the session which gives the option of keeping the session open or terminating the session. If a decision is not made within five minutes of receiving the notification, the iEdison system automatically terminates the session.

NOTE: If the modified data has not been saved when the session is abandoned, any unsaved changes are lost and need to be re-entered in another session.

1.2.5 Exiting the iEdison System

Logging out of the iEdison system ends the current session. The top and bottom of each screen contains a **Logout** hyperlink.

To log out of the iEdison system:

1. Select the **Logout** hyperlink to access the *Log Out of iEdison* screen.
2. Click the **Yes, I want to log out** button to end the current session and open the *Welcome to iEdison* screen.

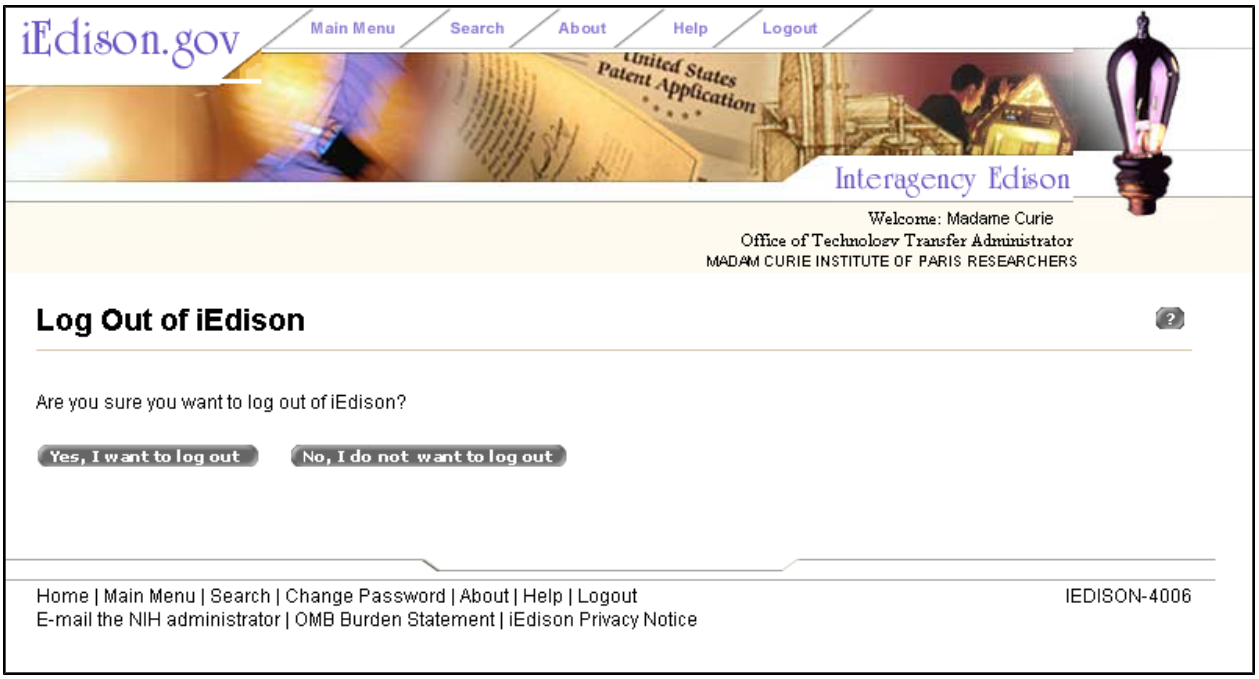

Figure 2: Log Out of iEdison Screen

1.2.6 Account Locked

For security reasons, the iEdison system locks an account when the number of maximum login tries has been exceeded. Administrators of the iEdison system set the number of retries allowed. Once an account is locked, the iEdison administrator must be contacted at the organization to get it unlocked. As long as the account remains locked, the secure screens cannot be accessed within the iEdison system. For more information, please refer to the Reset Password topic in the Commons online help.

1.2.7 Password Expiration

For security purposes, user passwords expire and must be reset. If a user password is about to expire, a message appears when the user logs in. If the password is expired, the system directs the user to select a new password when the next time a login to the system is attempted.

1.3 Contact iEdison User Support

The following hyperlinks to contact iEdison user support appear at the bottom of all base screens:

- **E-mail the NIH Administrator**
- **Feedback/Suggestions for iEdison**

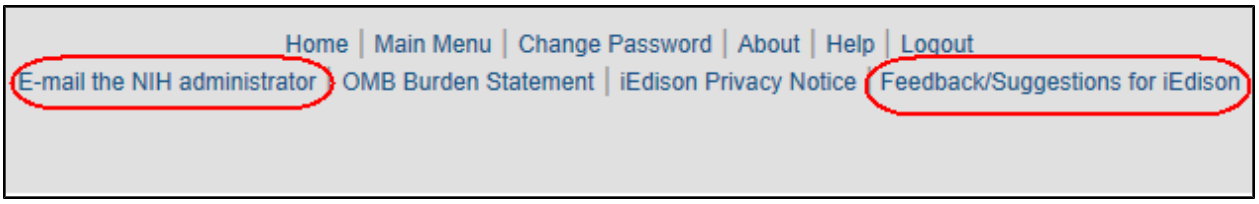

Figure 3: Bottom Portion of the iEdison Main Menu Screen Displaying Feedback Hyperlink

1.3.1 E-mail the NIH Administrator

1. To send a message to the iEdison user support, click the **E-mail the NIH Administrator** hyperlink.

The *Send Message to NIH iEdison Administrator* screen appears.

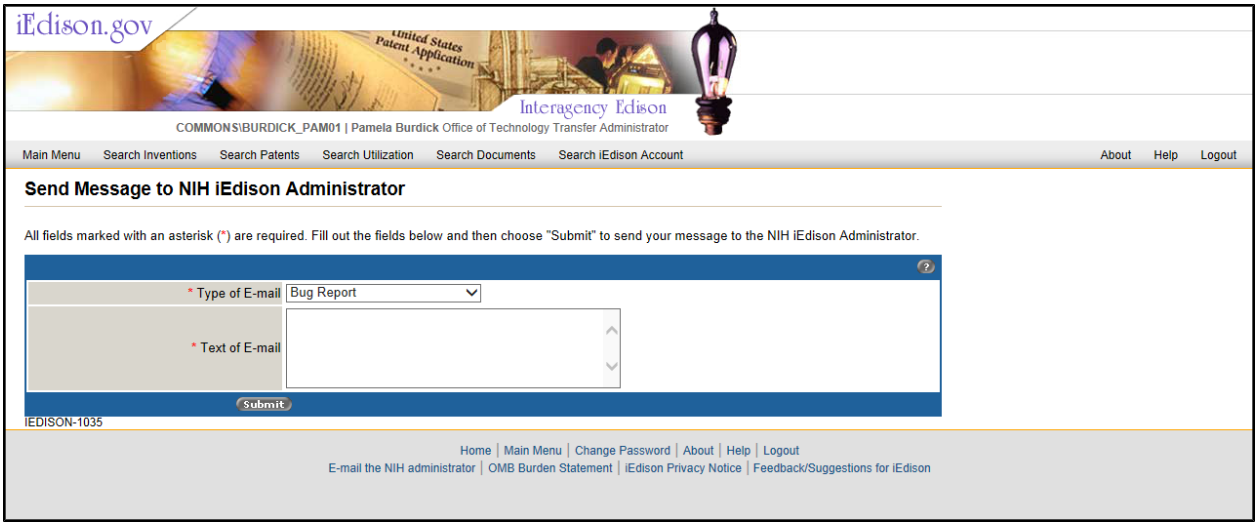

Figure 4: Send Message to NIH iEdison Administrator Screen

2. Select the type of email you want to send form the **Type of E-mail** drop-down list.
3. Enter the text of the message you want to send in the **Text of E-mail** field.
4. Click the **Submit** button.

When the **Submit** button is clicked, the system displays the *Send Message to NIH iEdison Administrator Confirmation* screen and sends an email notification to the NIH iEdison Administrator.

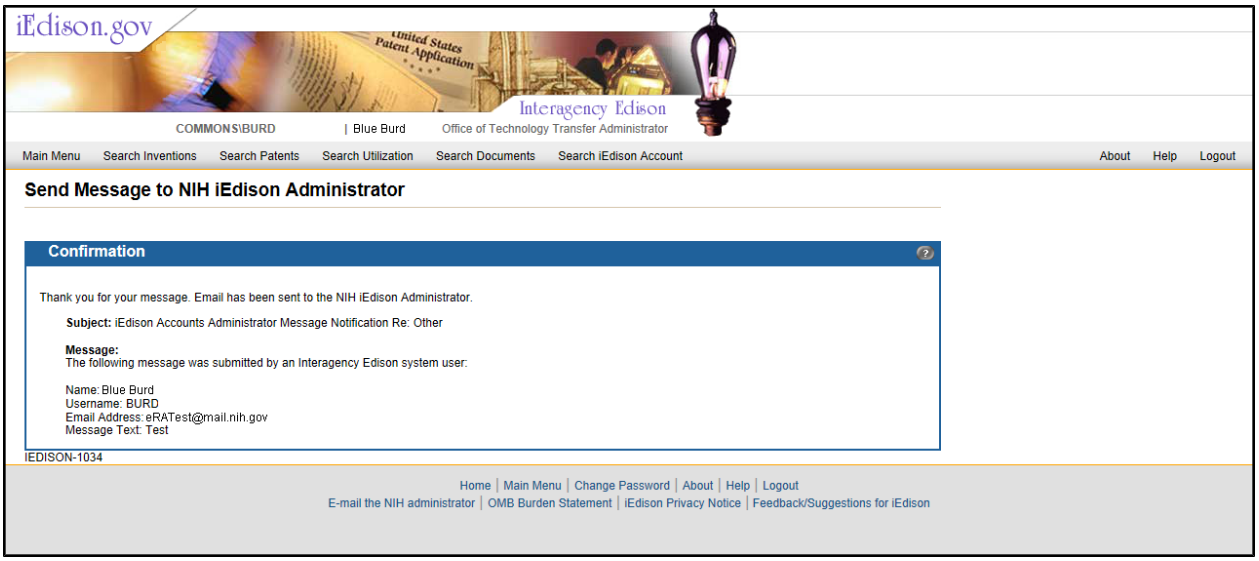

Figure 5: Send Message to NIH iEdison Administrator Screen

1.3.2 Feedback/Suggestions for iEdison

The Help Desk ticketing system called Footprints has the ability to generate Service Desk tickets based on emails received at a specific address.

iEdison now has the ability to access the Footprints system directly via a **Feedback/Suggestions for iEdison** hyperlink located at the bottom of each screen.

1. To access the *iEdison Commons Support Portal* screen, click the **Feedback/Suggestions for iEdison** hyperlink.

When the **Feedback/Suggestions for iEdison** hyperlink is clicked, the system displays the *iEdison Commons Support Portal* screen and automatically completes the **Last Name**, **First Name**, **Email**, **Customer ID**, and **Organization** information. Required fields are in red text and noted by an asterisk.

2. For information on completing the feedback/suggestion, click the **Help** button.

When the information is saved, the feedback/suggestion is saved in the Footprints system.

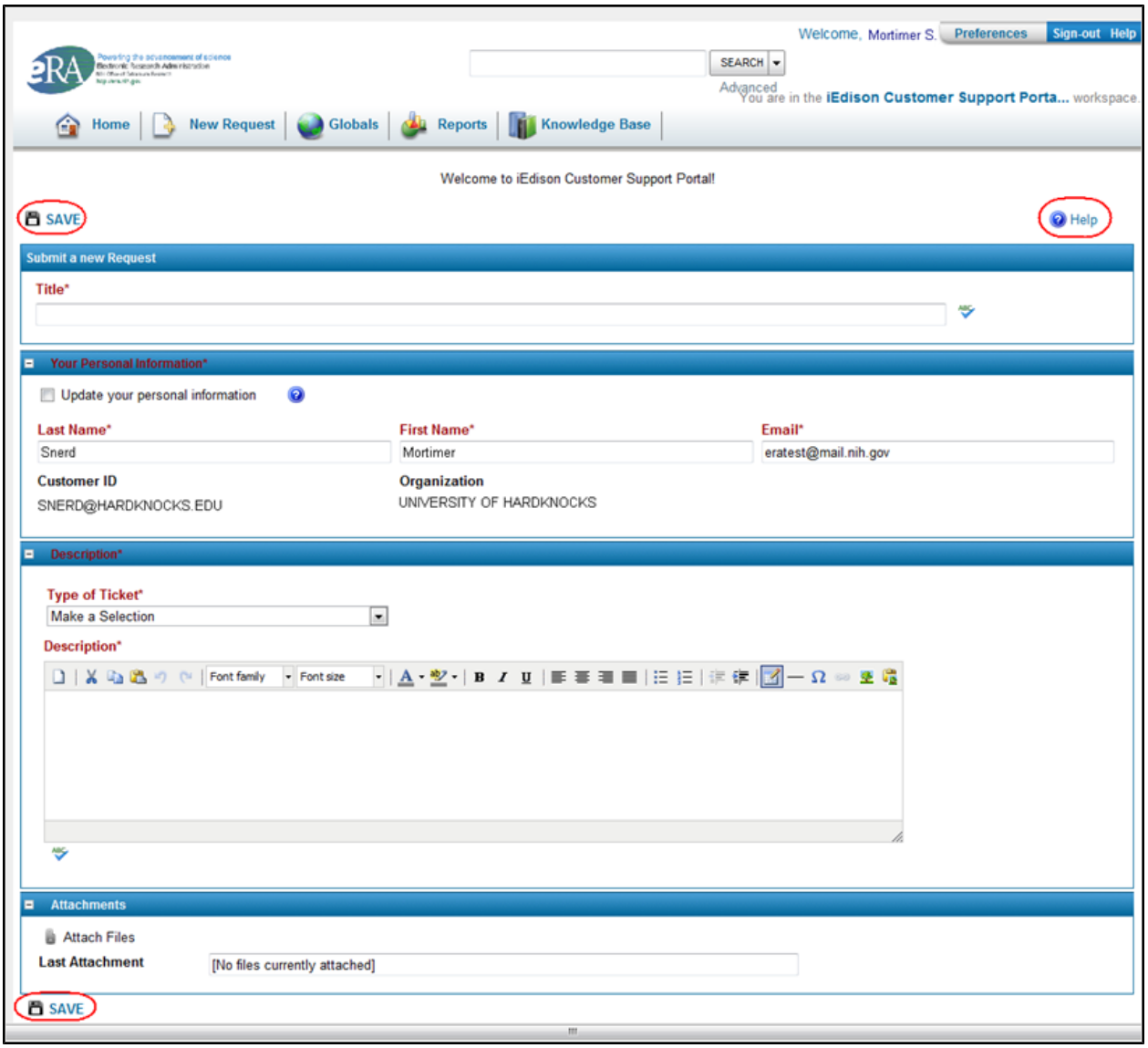

Figure 6: iEdison Customer Support Portal Screen

3. To searching for submitted feedback/suggestions, click the **Home** tab to access the *Home* screen.

If you are new to the Footprints system, the system displays *Create Account Form* screen. Required fields are in red text and are noted by an asterisk. By clicking the **GO** button, an account is created in the Footprints system and the Footprints *Login* screen is presented.

Please take some time to complete this form now.

Personal Data

Last Name*		First Name*		Email*	
Middle Initial		Organization		Professional Title	
Commons User ID		IMPACII User ID		Phone Number	
Secondary Email					

GO

Figure 7: Footprints Create Account Form Screen

2 Registration Information

2.1 Register an Organization in iEdison

To register your institution in the iEdison system perform the following steps:

1. From the *Welcome to iEdison* screen, select the **Register Institution to Use iEdison** hyperlink.

When the **Register Institution to Use iEdison** hyperlink is clicked, the system displays the *Request to Register iEdison Organization* screen.

NOTE: The Data Universal Numbering System (DUNS) is no longer required for an individual inventor registering as if they were an organization. This applies to inventors with inventors with approved inventor waivers.

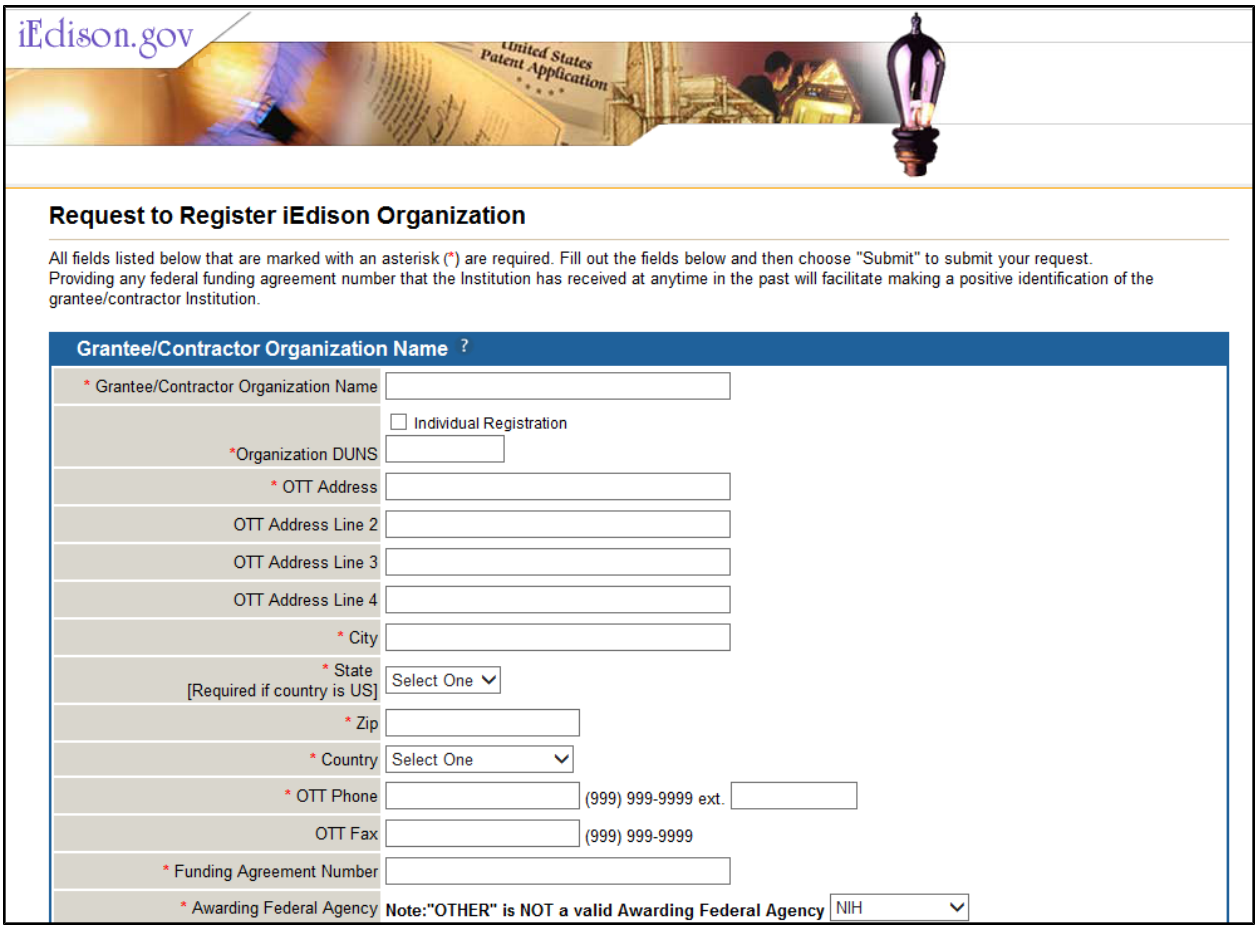

Figure 8: Top Half of the Request to Register iEdison Organization Screen

Extramural Technology Transfer Administrator who will manage accounts for the Organization ?

Prefix		(e.g. Dr., Ms., Rev.)
* First Name		
Middle Name		
* Last Name		
Suffix		(e.g. Jr., Nobel)
* Title		
* E-mail Address		
* Phone		(999) 999-9999 ext.
Fax		(999) 999-9999
* Requested Username		(6 - 20 characters)

Contact for Person on fax form ?

☐ **This section is for information about the signatory for the extramural organization. If the signatory is the same as the Extramural Office of Technology Transfer Administrator, check here and do not fill in the fields below.**

Prefix		(e.g. Dr., Ms., Rev.)
* First Name		
Middle Name		
* Last Name		
Suffix		(e.g. Jr., Nobel)
* Title		
* E-mail Address		
* Phone		(999) 999-9999 ext.
Fax		(999) 999-9999

Submit Reset

IEDISON-5000

Home | About | Help | Screen Id:
E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice

Figure 9: Bottom Half of the Request to Register iEdison Organization Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

2. Enter the registration request information, noting the following:
    a. Fields with an asterisk (*) are required.
    b. For an individual registration, select the **Individual Registration** check box.
    c. Providing any federal funding agreement number that the grantee or contractor organization, has received at anytime in the past will facilitate making a positive identification of the grantee or contractor organization. This also applies to sub-awards or sub-contractors who do not have a direct award. An individual inventor does not have a federal funding agreement number.
    d. The username has a six-character minimum and a twenty-character maximum. This is a unique name that must be assigned to one and only one user.
    e. The username field is case sensitive.

f. The **Requested Username** and **E-mail Address** fields do not accept all characters (e.g. &, *, $).

NOTE: A DUNS number is required for registration in iEdison as of Jan. 31, 2014 for Grantee and Contractor organizations. An individual inventor with an assignment from the organization that has waived the rights to that invention does not need a DUNS number to register in iEdison.

3. Click the **Submit** button to enter the registration information or click the **Reset** button to clear out the fields to start again.

When the **Submit** button is clicked, the system displays the *Request to Register iEdison Organization Step 2* screen is displayed.

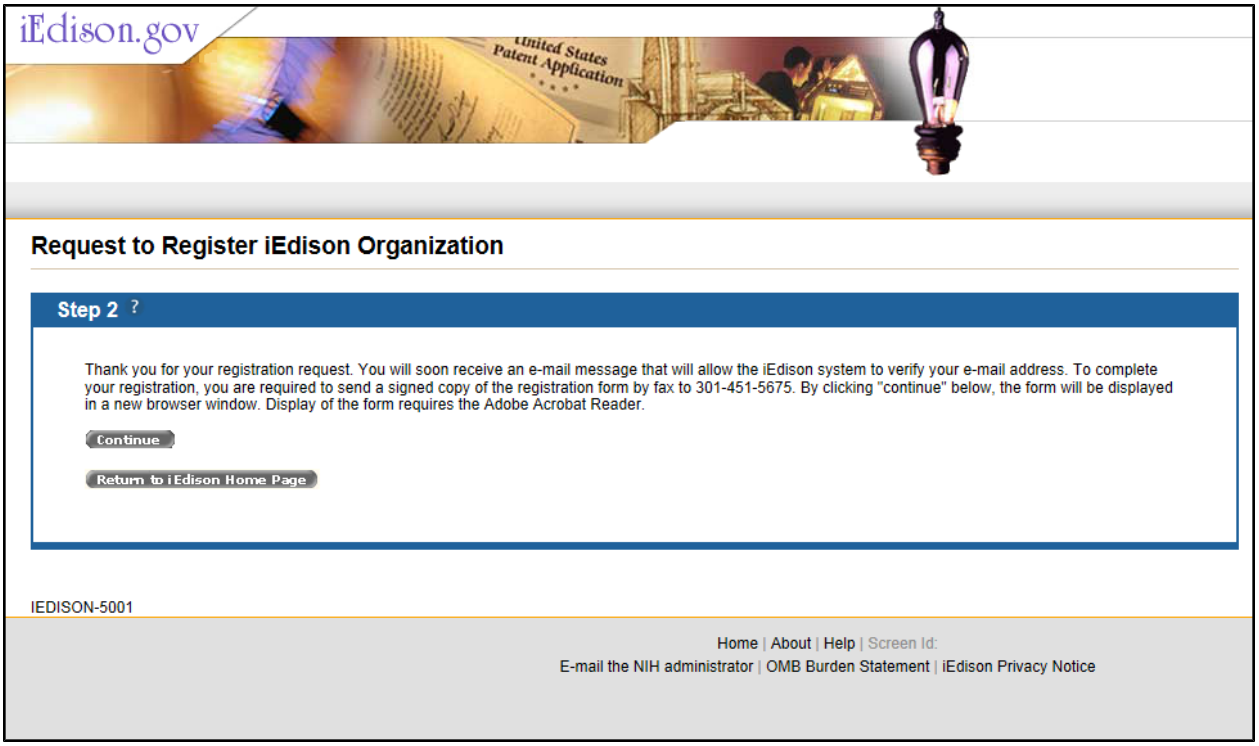

Figure 10: Request to Register iEdison Organization Step 2 Screen

4. Click the **Continue** button to access the *Interagency Edison Registration Form*.

NOTE: You need Adobe Acrobat Reader to display the printable version of the *Interagency Edison Registration Form*.

5. Print the *Interagency Edison Registration Form* and then close the window.

6. Perform **one** of the following options:
    a. Sign the form, scan the form, and email it to NIH at Edison@od.nih.gov or ...
    b. Sign the registration form and fax it to NIH at 301-451-5675.
7. Click the **Return to iEdison Home Page** button.

When the **Return to iEdison Home Page** button is clicked, the *Welcome to iEdison* screen is displayed.

2.2 Verify Your Email Address during Registration

Before your grantee or contractor organization's iEdison registration request can be processed, the iEdison system needs to verify the email address associated with the registration request. To accomplish this, an email notification is sent to the email address associated with the registration request. This individual is expected to verify that email address by following the instructions in the email notification.

To verify the email address:

1. From your email client, open the email message with the subject *iEdison E-mail Address Verification*.
2. Click the email hyperlink in the email message.

The registration request submitted on 02/13/2014 2:12 pm in the Interagency Edison system for ' MADAM CURIE INSITITUE OF PARIS RESEARCHERS ' has been received. You have been listed as the Extramural Technology Transfer Administrator who will manage accounts for the grantee/contractor organization. In order to proceed with the registration request, we need you to verify your e-mail account by responding to this message.

Please click on the link below to verify your e-mail address for the iEdison Registration Request.

http://public.test.era.nih.gov/iedison/public/RegistrationVerifyEmail.do?request_id=260873

Once the Interagency Edison system has verified your e-mail address you will receive a message confirming your username. Your password will be the one chosen when your grantee/contractor organization was registered.

Without this response your account will not be created. If you have difficulties or receive errors please contact iEdison User Support at edison@od.nih.gov.

Figure 11: Example of hyperlink in iEdison E-mail Address Verification Notification

When the email hyperlink is clicked, the iEdison system verifies your email address and displays the *Verify Organization E-mail Address* screen in a new browser window.

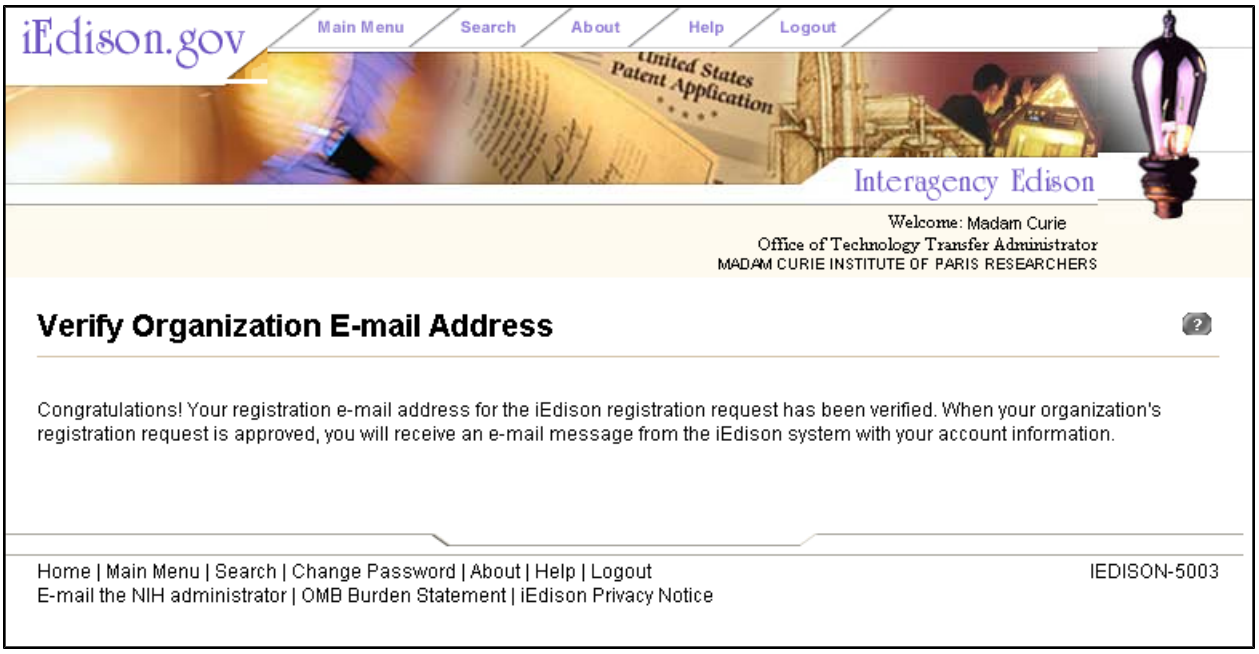

Figure 12: Verify Organization E-mail Address

3 Viewing Main Menu Screen

3.1 Main Menu Screen Layout

The *Main Menu* screen layout contains two main regions:

- The iEdison navigation menu (listed along the top of the screen)
- The hyperlink navigation options (main central section of screen)

The *Main Menu* screen provides access to all other screens needed to work in iEdison.

NOTE: The *Main Menu* screen options displayed depends on the individual users type of account.

Here is the *Main Menu* screen for the OTT Administrator.

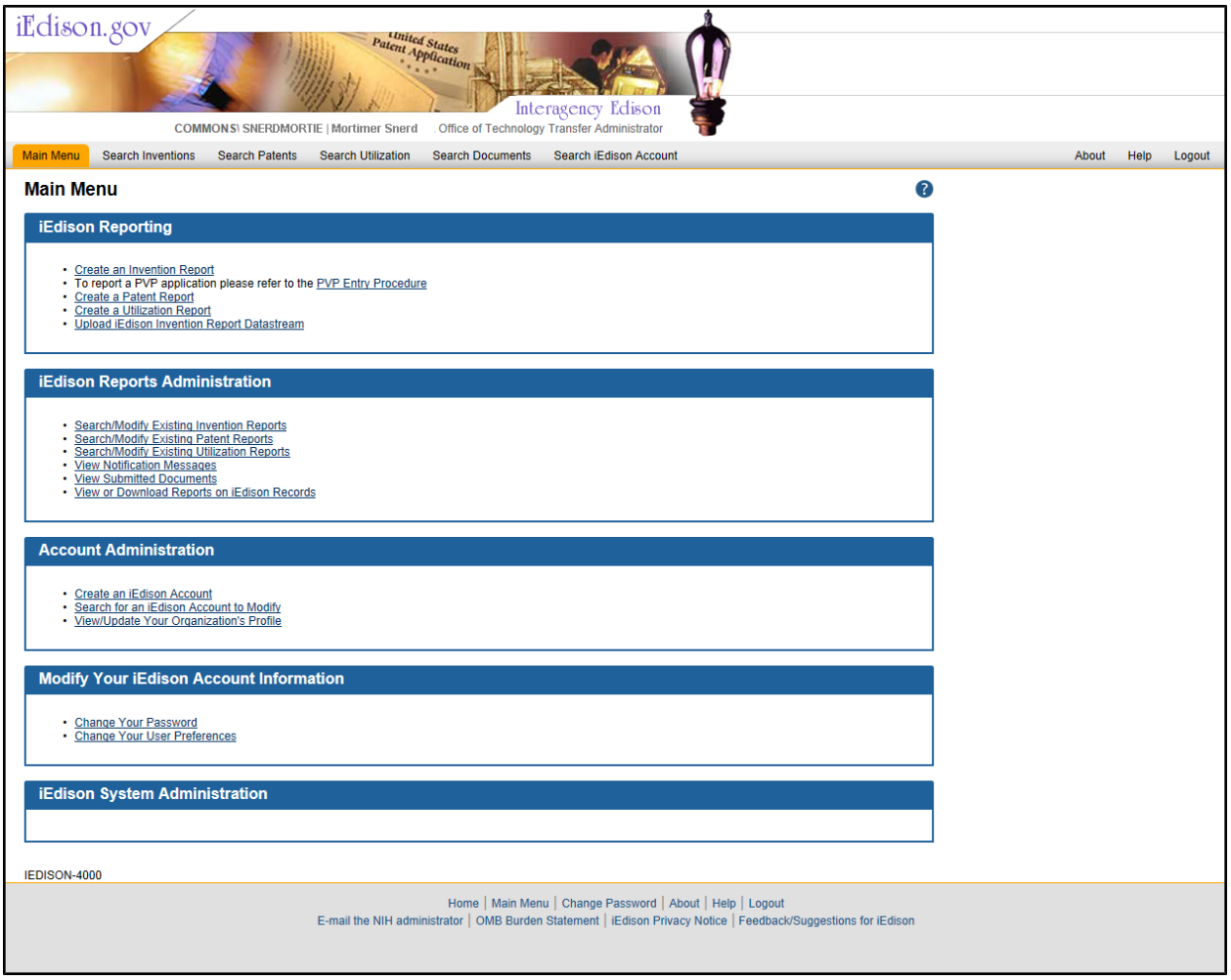

Figure 13: iEdison Main Menu Screen

3.2 Navigation Menu

The following menu tabs are available in iEdison:

- **Main Menu** - Displays the *Main Menu* screen
- **Search Inventions** - allows searching for Invention Reports
- **Search Patents** - allows searching for Patent Reports
- **Search Utilization** - allows searching for Utilization Reports
- **Search Documents** - allows searching for Confirmatory License, Government Support Clause, or Invention Disclosure documents
- **Search iEdison Account** - allows searching for user accounts via the Account Management System (AMS)
    - For more information, please refer to the Search for an iEdison Account to Modify topic for instructions on how to search and modify an iEdison account.
- **About** - Displays the iEdison - About topic on this web site (https://era.nih.gov/iedison/about.cfm)
- **Help** - Displays the iEdison online help, user guides, and release notes hyperlinks, etc. (see https://era.nih.gov/iedison/user_guides.cfm)
- **Logout** - Displays the *Log Out of iEdison* screen
    - Please refer to the Exiting the iEdison Application topic for instructions on how to log out of the system.

3.3 Main Menu Options

3.3.1 iEdison Reporting

- **Create an Invention Report** - Displays the *Create New Invention Report* screen
    - Creating an invention report is for users with the TTO Administrator role or the TTO user role.
    - Please refer to the Add New Invention Report topic for more information.
- **PVP Entry Procedure** - Displays a PDF file with instructions for entering Plant Variety Protection (PVP) data into the iEdison system
- **Create a Patent Report** - Displays the *Invention Report Search* screen
    - You must search the invention report you want to associate with the new patent report. Please refer to the Add a New Patent Report topic for instructions on how to Create a Patent Report.

- **Create a Utilization Report** - Displays the *Invention Report Search* screen
  - You must search the invention report you want to associate with an annual utilization report and select the **Manage Utilization Reports** button. Please refer to the Add a New Utilization Report topic for instructions on how to create a Utilization Report.
- **Upload iEdison Invention Report Datastream** - Displays the *Upload iEdison Invention/Patent Reports* screen
  - Please refer to the Bulk Uploads topic for instructions on how to upload iEdison Invention/Patent Reports.

3.3.2 iEdison Reports Administration

- **Search/Modify Existing Invention Reports** - Displays the *Invention Report Search* screen
  - Please refer to the Search for an Invention Report topic for instructions on how to search for an invention report to modify.
- **Search/Modify Existing Patent Reports** - Displays the *Patent Report Search - Search for iEdison Patent Report* screen
  - Please refer to the Search Patent Reports topic for instructions on how to search for a patent report to modify.
- **Search/Modify Existing Utilization Reports** - Displays the *Utilization Report Search - Search for iEdison Utilization Report* screen
  - You must search for the invention report you want to associate with an annual utilization report is associated. Please refer to the Search Utilization Reports topic for instructions on how to search for a utilization report to modify.
- **View Notification Messages** - Displays the *View Notification Messages* screen
  - Please refer to the Messages for instructions on how to view notification messages.
- **View Submitted Documents** - Displays the *View Documents* screen
  - Please refer to the Viewing Submitted Documents topic for instructions on how to search for and view a document.
- **View or Download Reports on iEdison Records** - Displays the *Report Menu* screen
  - Please refer to the Generating iEdison Reports topic for instructions on how view reports and download data in the iEdison system.

3.3.3 Account Administration

- **Create an iEdison Account** - Displays the Account Management System (AMS) *Create Account* screen
  - Please refer to the Create an iEdison Account topic for instructions on how to create a new iEdison account.

- **Search for an iEdison Account to Modify** - Displays the AMS *Modify Account* screen
  - Please refer to the Search for an iEdison Account to Modify topic for instructions on how to search and modify an iEdison account.
- **View/Update Your Organization's Profile** - Displays the Commons *View Institutional Profile* screen
  - Please refer to the View/Update Your Organization's Profile topic for instructions on how to modify your organization's profile.

3.3.4 Modify Your iEdison Account Information

- **Change Your Password** - Displays the AMS *Change Password* screen
  - Please refer to the Change Your Password topic for instructions on how to change your password.
- **Change Your User Preferences** - Displays the Commons *Personal Profile Summary* screen
  - Please refer to the Change Your User Preferences topic for instructions on how to modify your user preferences.

3.4 Common Elements on iEdison Screens

All screens in the iEdison system contain certain common elements that facilitate navigation of the system.

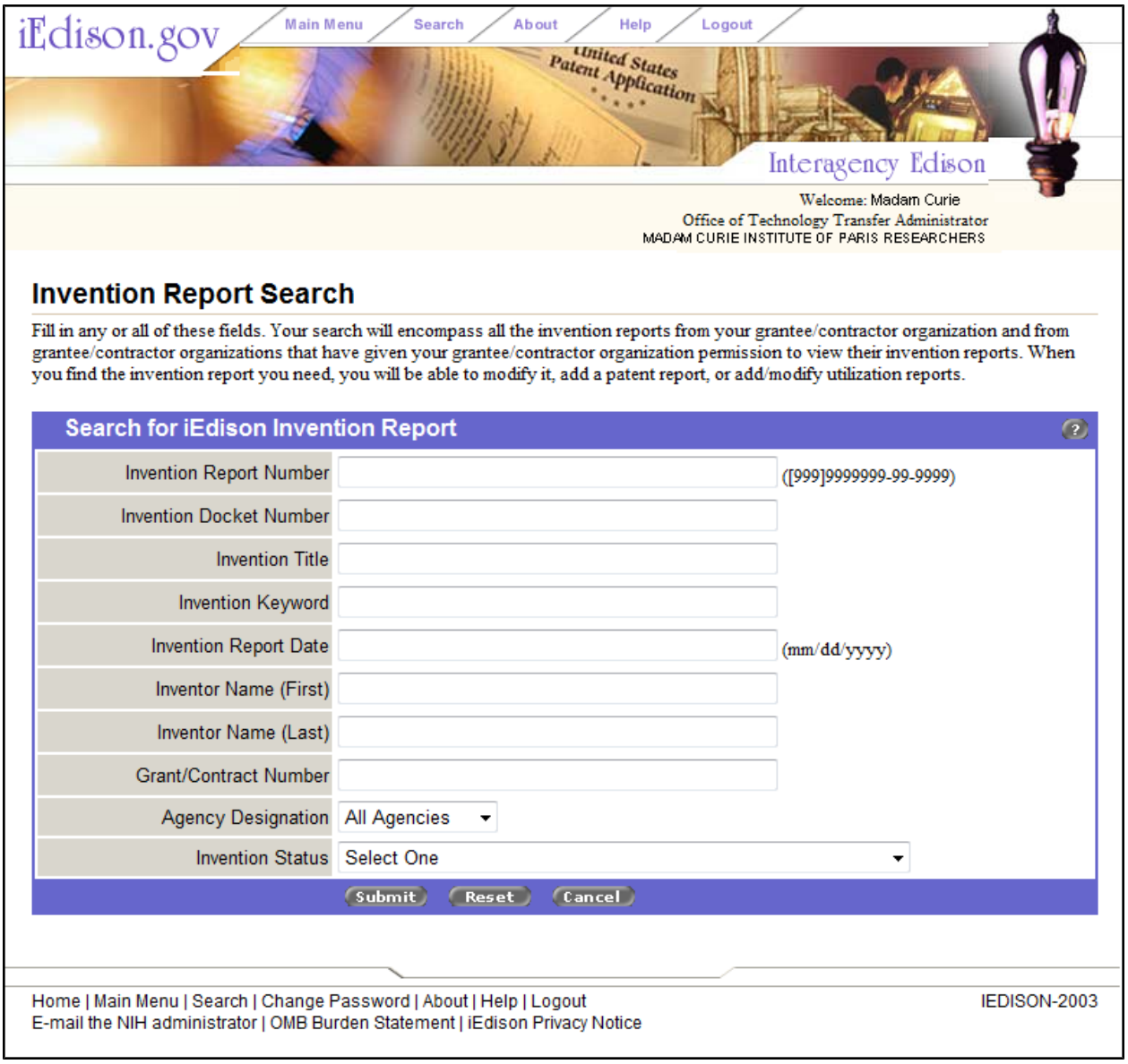

Figure 14: Invention Report Search Screen Displaying Common Elements

The following common elements are available:

iEdison Common Elements

Name	Description
Title Bar	The title bar lists the iEdison system name and the current screen name.
Navigation Bar	The navigation menu contains options to access many of the iEdison functions. The options available vary depending on whether you are logged in to the iEdison system.

iEdison Common Elements

Name	Description
Account Identification	The account identification section displays the name, user type, and affiliation associated with the logged-in account. Therefore, this information appears only when you are logged in to the iEdison system.
Body	The body of the screen displays the main functions available on the screen and any action buttons (e.g., **Submit**, **Cancel**) associated with the functionality.
Footer Navigation Menu	The footer navigation menu contains options to access many of the iEdison functions as well as return to the iEdison *Home* screen. The options available vary depending on whether you are logged in to the iEdison system.
E-mail the NIH Administrator	When clicked the email hyperlink displays the *Send Message to NIH iEdison Administrator* screen. This screen allows you to send the NIH iEdison Administrator an email message. **Hint:** If your question is about a specific invention report, please include the Invention Report Number (EIR) number for the invention.
OMB Burden Statement Hyperlink	The OMB burden statement hyperlink displays the *OMB Reporting Burden* screen.
iEdison Privacy Notice Hyperlink	The iEdison Privacy Notice Hyperlink displays the *iEdison Privacy Notice* screen.
iEdison Screen Identifier	All iEdison screens have a unique screen identifier located in the lower right-hand corner of the screen (i.e., IEDISON- 1000). When reporting any problems experienced when using the iEdison system, please include this screen identifier when corresponding with the iEdison Service Desk.

3.4.1 Secondary Screens

Secondary screens are secondary screens that provide additional information or request additional input for working with base screens.

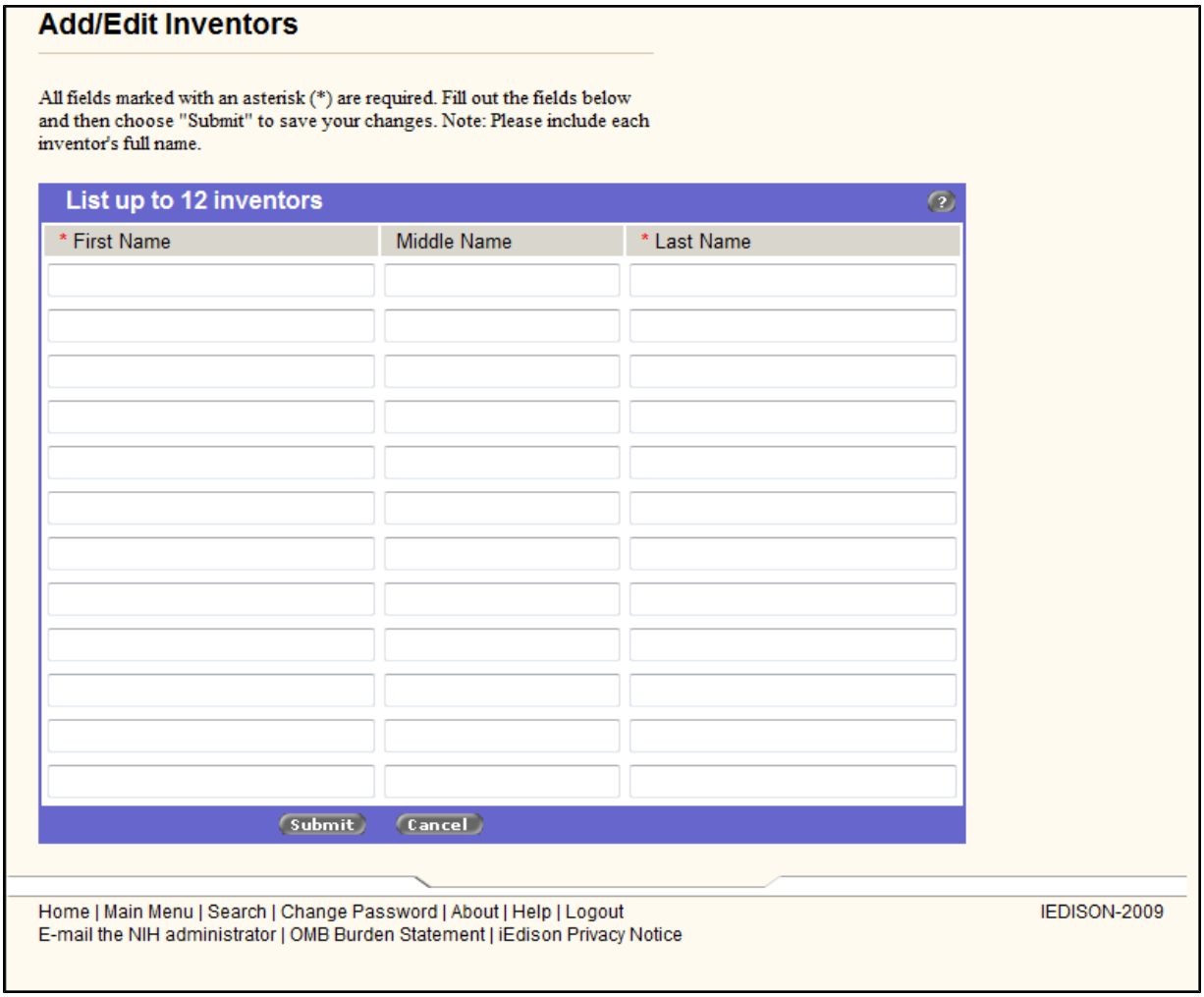

Figure 15: Example of iEdison Support Screen

3.5 PVP Entry Procedure

When the **PVP Entry Procedure** hyperlink is clicked, the system displays a PDF file with instructions for entering protocol for Entering Plant Variety Protection (PVP) data into the iEdison system.

3.6 Technology Transfer Office (TTO) Administrator Role

Here is the Main Menu screen for users with the TTO Administrator user role.

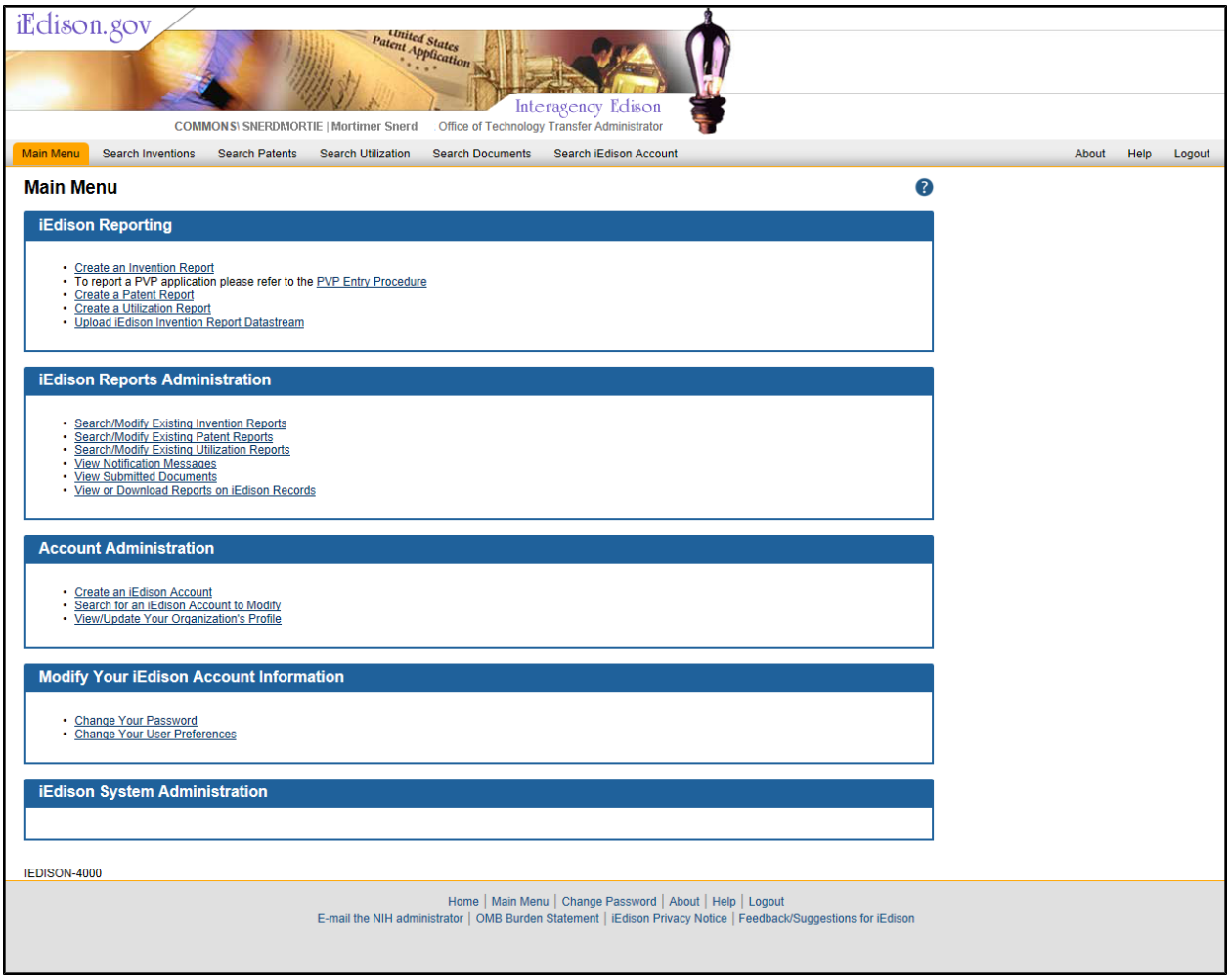

Figure 16: Main Menu Screen for the TTO Administrator User Role

Please refer to the Viewing Main Menu Screen topic for information on each menu item.

3.7 Technology Transfer Office (TTO) Staff Role

Here is the *Main Menu* screen for users with the TTO Staff role.

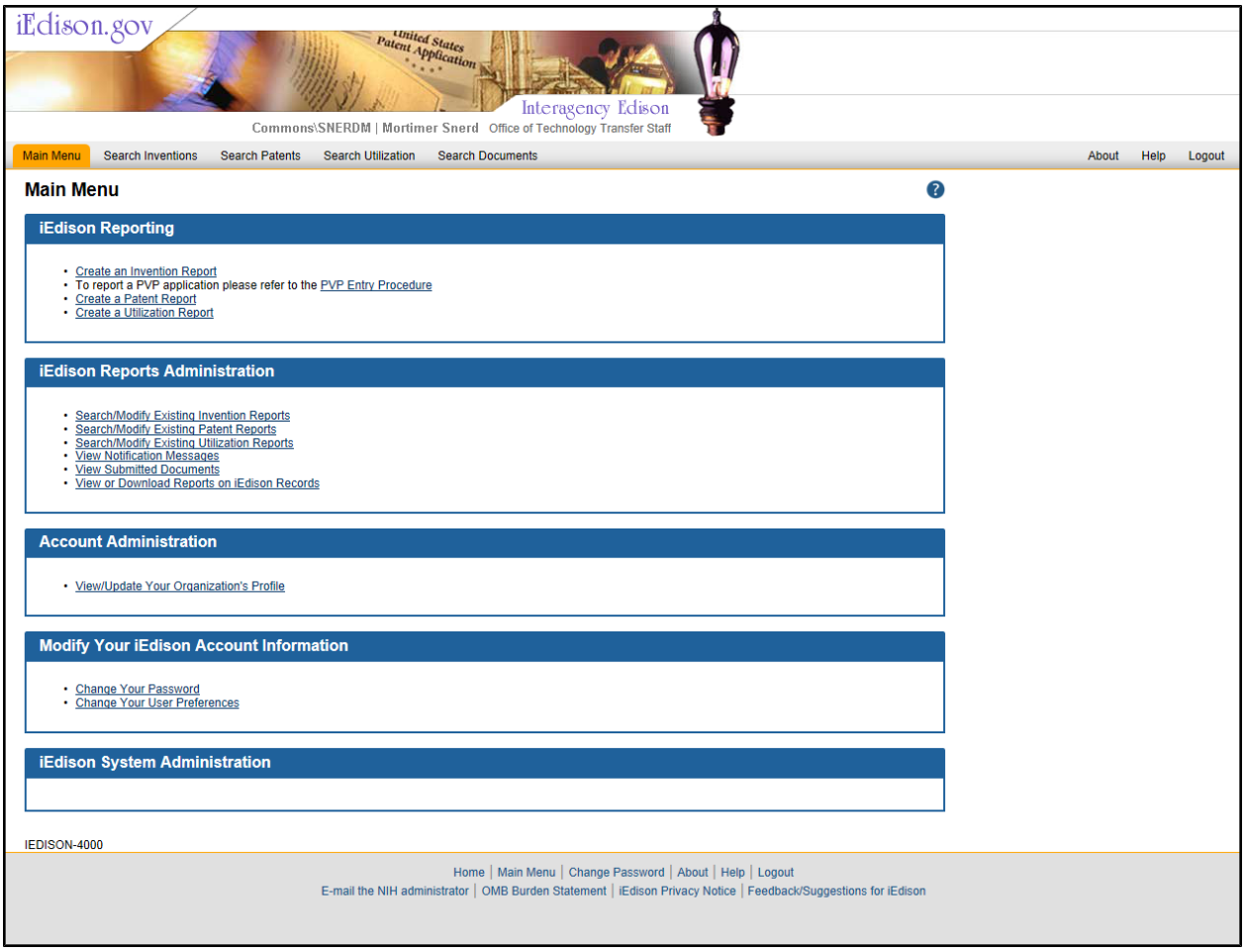

Figure 17: Main Menu Screen for the TTO Staff Role

Please refer to the Viewing Screens and Menus topic for information on each menu item.

3.8 Inventor Role

Here the *Main Menu* screen for users with the Inventor role.

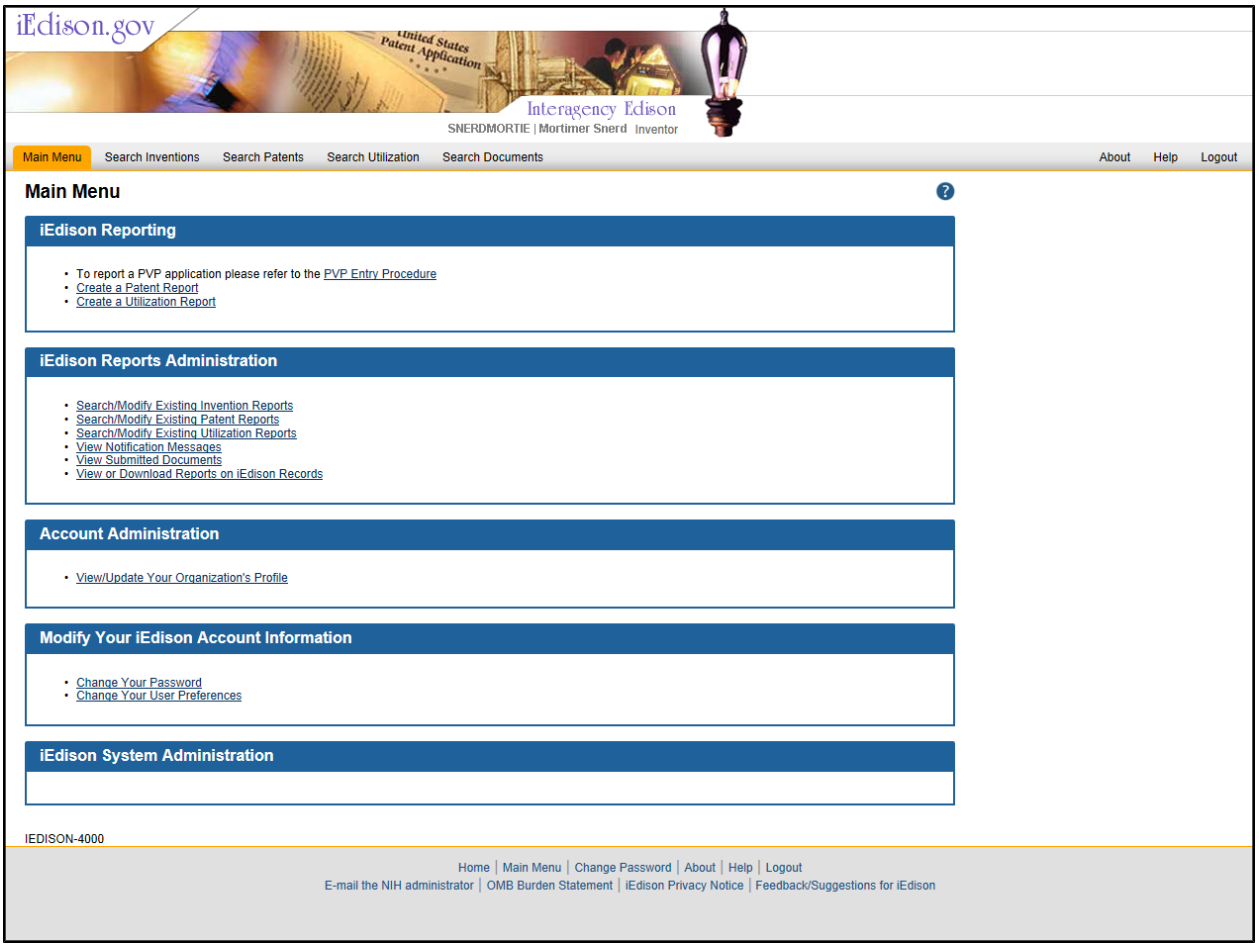

Figure 18: Main Menu Screen for Inventor Role

Please refer to the Viewing Main Menu Screen topic for information on each menu item.

4 Account Administration

Administering an iEdison account is performed through the Account Management System (AMS). For information on the Commons system, please refer to Commons online help. For information on AMS, please refer to the new AMS online help.

AMS has the following user functionality:

- Search for Accounts
- Create Accounts
- Modifying Accounts
- Reset Password
- Change Password

Viewing and updating your organization's profile is performed through the Institution Profile (IPF) system. For information on the Commons IPF system, please refer to the IPF topic in the Commons online help.

4.1 Create an iEdison Account

1. To create an iEdison account, click the **Create an iEdison Account** hyperlink on the *Main Menu* screen.

When the **Create an iEdison Account** hyperlink is clicked, a pop-up *Message* screen displays.

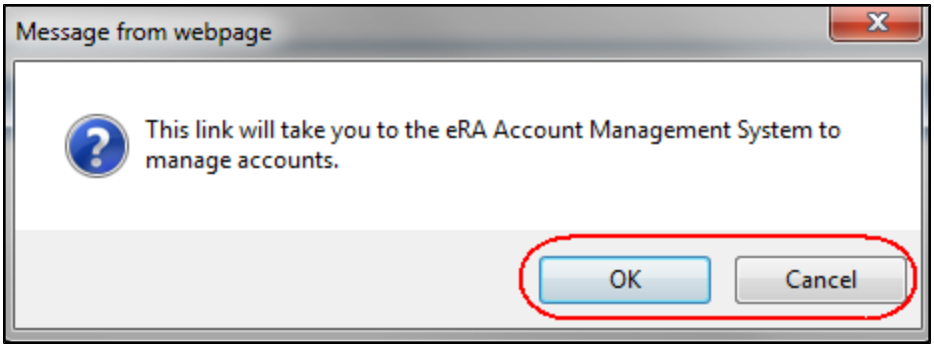

Figure 19: AMS Pop-up Message Screen

When the **OK** button is clicked on the pop-up *Message* screen, the system displays in a separate browser window the *Create Account* screen in the Account Management System (AMS).

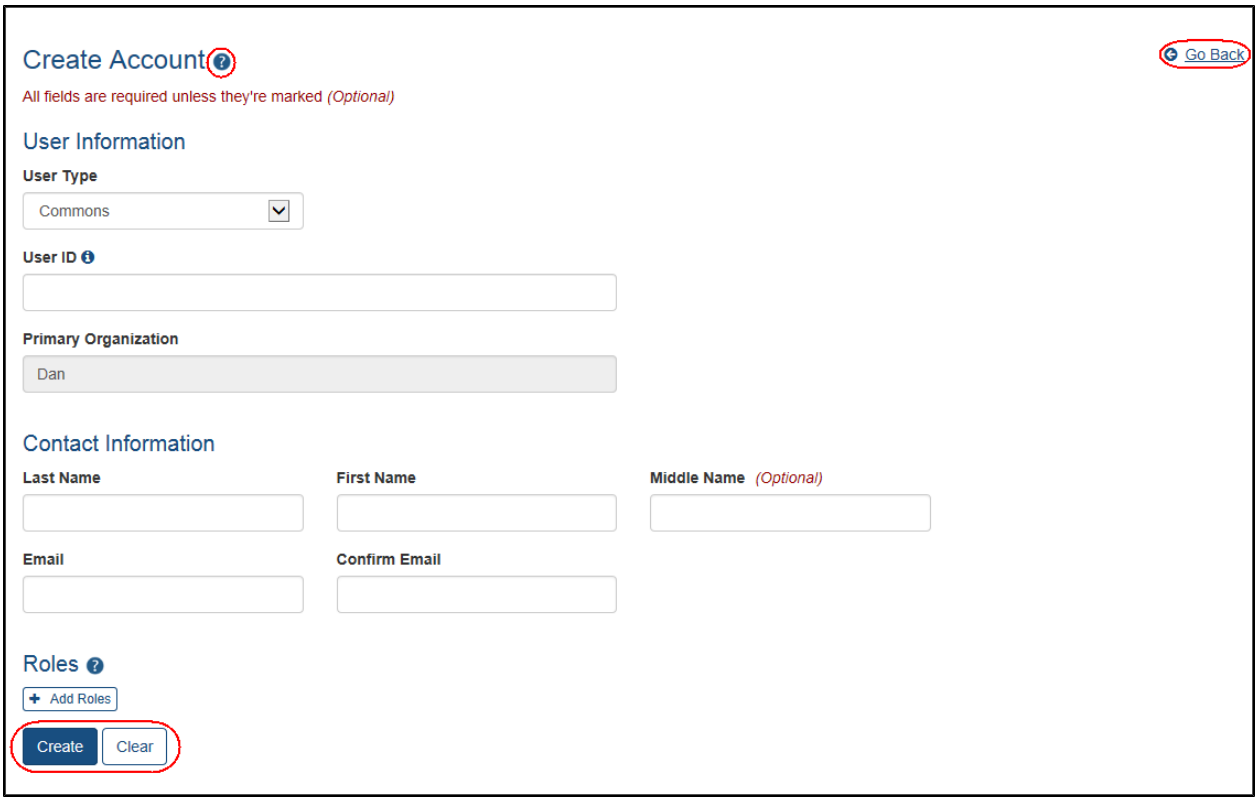

Figure 20: AMS Create Account Screen

For information on creating an iEdison account, click the question mark help icon on the *Create Account* screen or refer to the Create New Account topic in the AMS online help.

4.2 Search for an iEdison Account to Modify

1. To search an iEdison account, click the **Search for an iEdison Account to Modify** hyperlink on the *Main Menu* screen.

When the **Search for an iEdison Account to Modify** hyperlink is clicked, a pop-up *Message* screen displays.

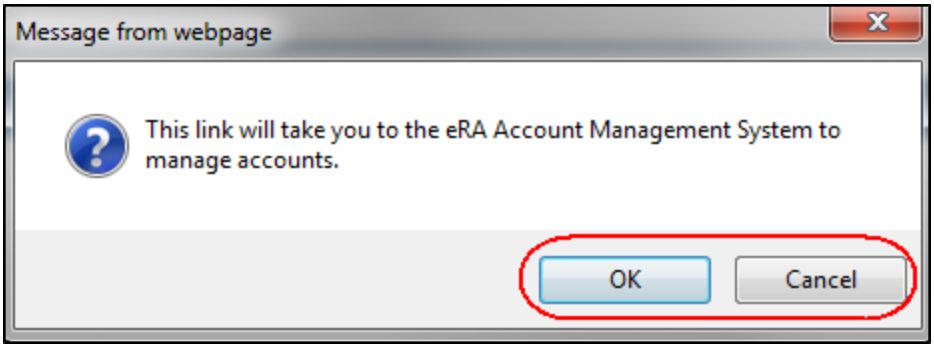

Figure 21: AMS Pop-up Message Screen

When the **OK** button, the system displays in a separate browser window the *Search Accounts* screen in the Account Management System (AMS).

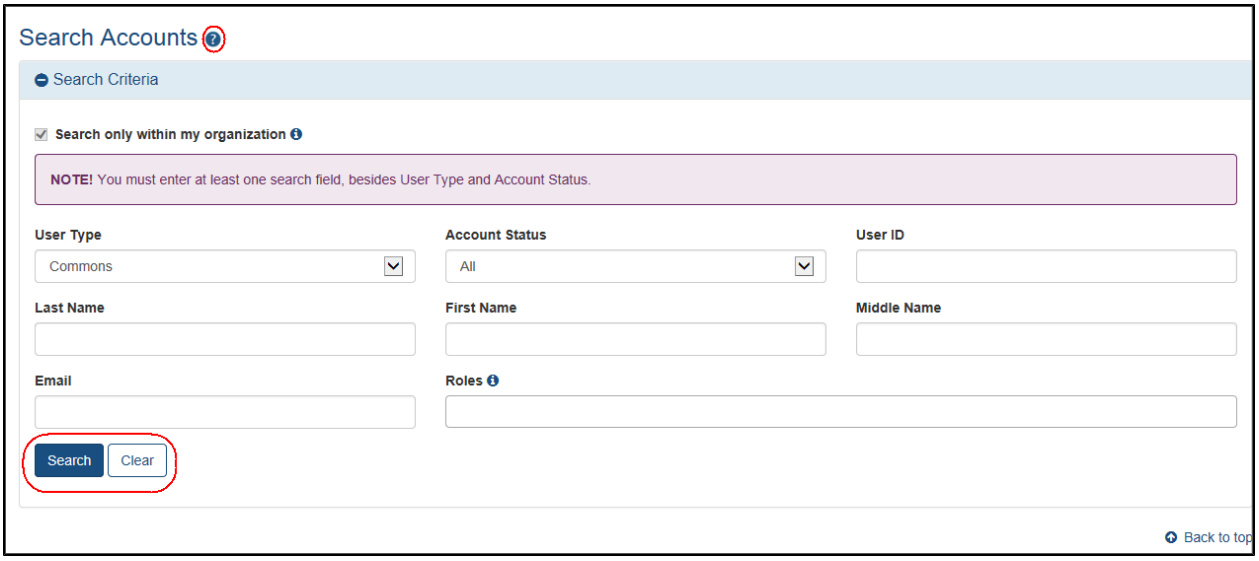

Figure 22: AMS Search Accounts Screen

For information on user roles, please refer to the User Roles topic.

For information on searching for an iEdison account, click the question mark help icon on the *Search Accounts* screen or refer to the Search iEdison Accounts topic in the AMS online help.

4.3 View/Update Your Organization's Profile

1. To view and/or update your organization's profile, click the **View/Update Your Organization's Profile** hyperlink on the *Main Menu* screen.

When the **View/Update Your Organization's Profile** hyperlink is clicked, the system displays the Commons *View Institution Profile* screen.

U.S. Department of Health & Human Services www.hhs.gov

Electronic Research Administration eRA Commons Sponsored by National Institutes of Health

Welcome: Madam Curie
ID: CURIEMADAM
Institution: MADAM CURIE INSTITUTE OF PARIS RESEARCHERS
Roles: EXTRAMURAL_TTO_ADMIN
Logout | Contact Us | Help

Home | Institution Profile | Personal Profile
Basic

View Institution Profile

View

Basic Institution Information

Institution Name:	MADAM CURIE INSTITUTE OF PARIS RESEARCHERS		
Preferred Institution Name:	MADAM CURIE INSTITUTE OF PARIS RESEARCHERS		
IPF Code:	99999		
NoA E-mail:	eRATest@mail.nih.gov	**Policy Announcements and Notifications Email Address:**	eRATest@mail.nih.gov
DUNS Number:	99999999		
Indirect Cost Negotiator:	Jim Andy Shorts , DHHS	**Most Recent Date of Negotiation:**	07/02/2009
Federal Wide Assurance Number(s):	FWA0000	**Animal Welfare Assurance Number(s):**	A3108-01
Type of Organization:	Independent hospitals		
Type Of Organization - Other:			
Ownership Control:	Private, Nonprofit Independent		

Institution Address

Address 1:	MADAM CURIE INSTITUTE OF PARIS RESEARCHERS	**City:**	CINCINNATI
Address 2:	3333 BURNET AVE	**State/Province:**	OH
Address 3:		**Zip Code:**	452293039
Address 4:		**Country:**	
Phone Number:	999-999-9999	**Fax Number:**	

Institution Contact Information

Contact Name:	Sue Case
Phone Number:	999-999-9999
Email:	eRATest@mail.nih.gov

Extramural Technology Transfer Administration

Contact Name:	Bud Light
Phone Number:	999-999-9999
Email:	eRATest@mail.nih.gov
Are batch uploads allowed by this organization?	No
The month that begins utilization reporting period	July
Are the inventions submitted by the organization assigned for administration and reporting to the user?	No

Signing Officials	Email	Phone Number
No Signing Officials found		

Figure 23: View Institution Profile Screen

For more information on viewing and/or updating your organization's profile, please refer to the Viewing and Editing IPF Information topic in the Commons online help.

5 Modify iEdison Account Information

Passwords for Grantee and Contractor user accounts preferences are changed via the Account Management System (AMS).

User preferences are changed/updated via the Personal Profile System (PPF) respectively.

1. For information on the Commons system, please refer to Commons online help.
2. For information on AMS, please refer to the AMS online help.
3. For information on the PPF system, please refer to the PPF topic in the Commons online help.

5.1 Change Your User Preferences

Changing your user preferences is performed in the Commons Personal Profile System.

To change your user preferences:

1. Select **Main Menu** tab.
2. Under the *Modify Your iEdison Account Information* sub-menu select the **Change Your User Preference** hyperlink.

When the **Change Your User Preference** hyperlink is clicked, the system displays the Commons' *Personal Profile Summary* screen.

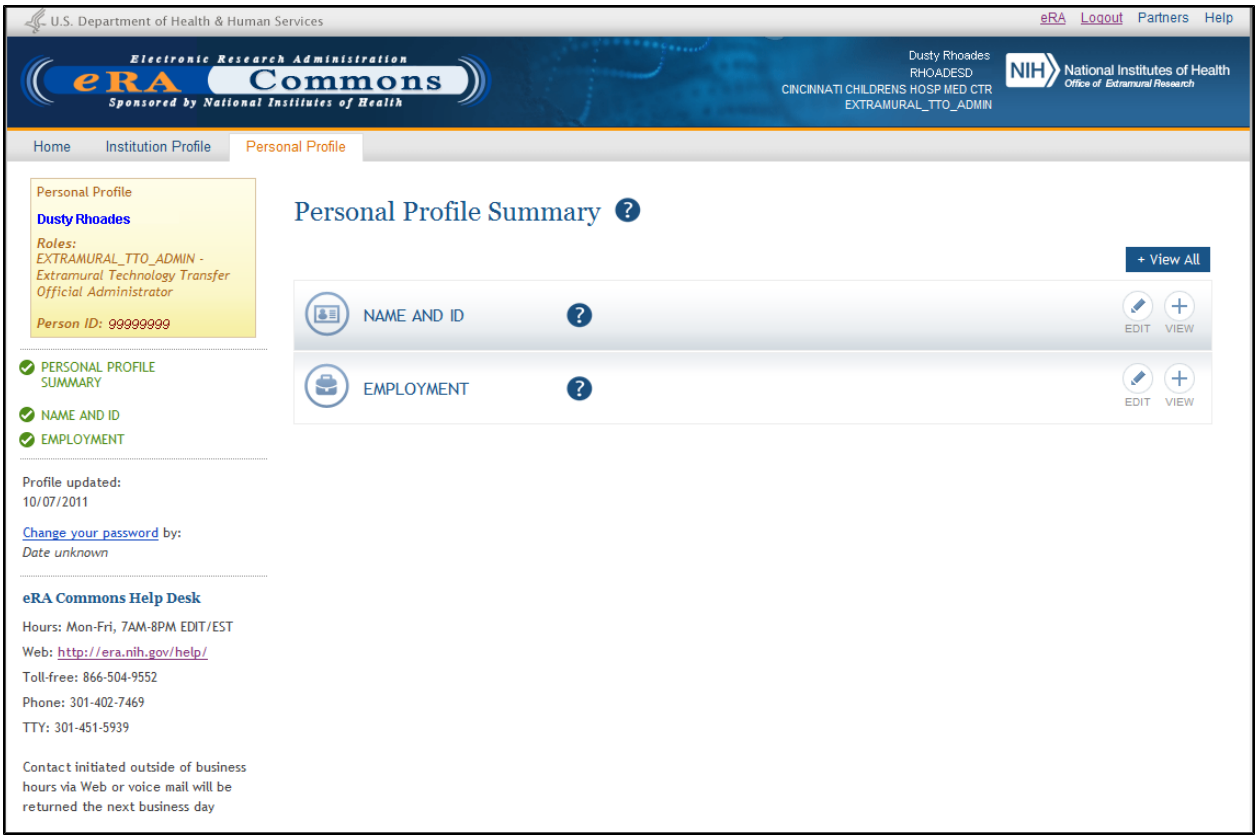

Figure 24: Commons Personal Profile Summary Screen

For more information, please refer to the Personal Profile Summary topic in the Commons online help.

5.2 Change Your Password

To change your password:

1. Select **Main Menu** tab.
2. Under the *Modify Your iEdison Account Information* menu select the **Change Your password** hyperlink.

When the **Change Your password** hyperlink is clicked, a pop-up *Message* screen displays.

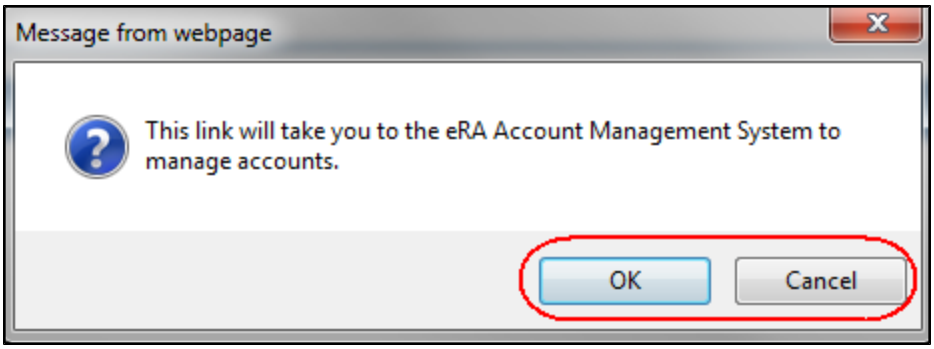

Figure 25: AMS Pop-up Message Screen

When the **OK** button is clicked on the pop-up *Message* screen, the system displays the AMS *Change Password* screen.

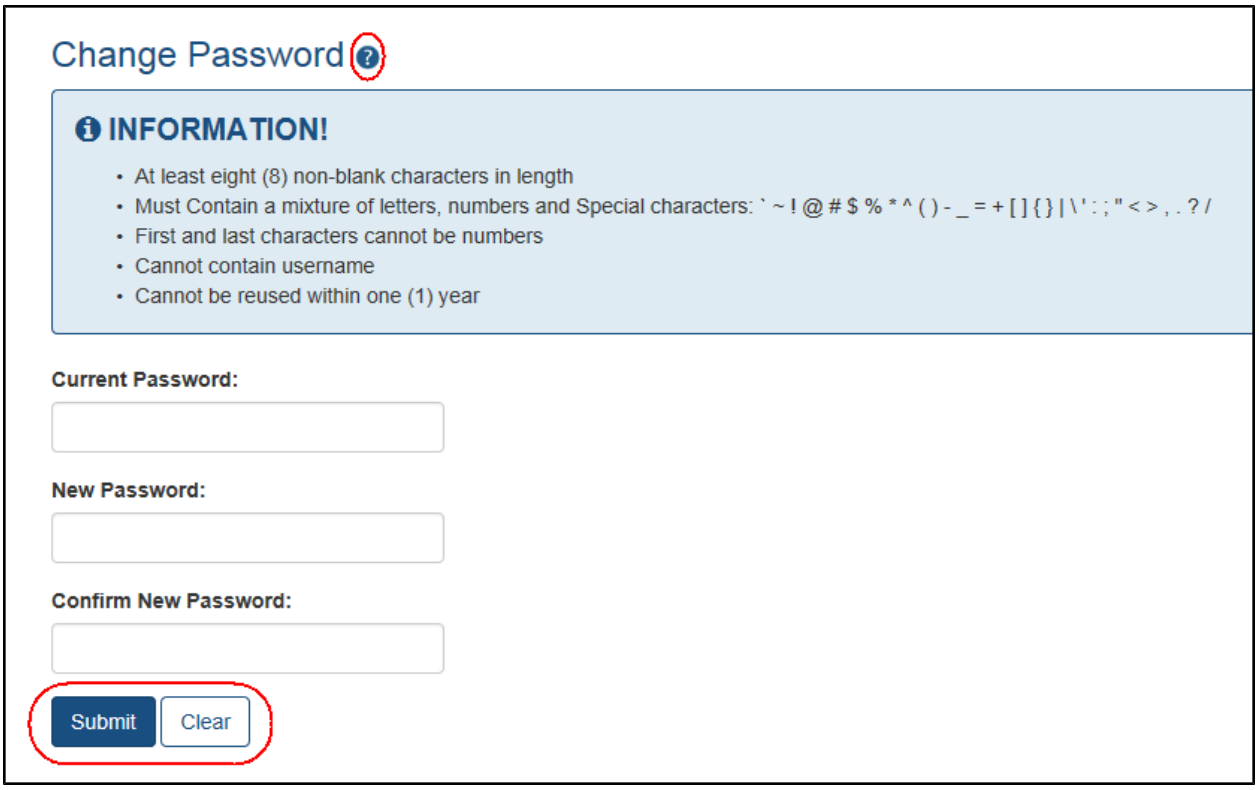

Figure 26: Commons Change Password Screen

For more information on changing your password, click the question mark help icon on the *Change Password* screen or refer to the Change Password topic in the new ams online help.

6 Invention Report Information

iEdison has the following Invention report functionality:

- Creating an Invention Report (Administrator and User Role only)
- Searching for an Invention Report
- Modifying an Invention Report

6.1 Create an Invention Report

1. To create an *Invention Report*, select **Create an Invention Report** hyperlink on the *Main Menu* screen.
2. To modify an *Invention Report*, please refer to the Search for an Invention Report topic.

When the **Create an Invention Report** hyperlink is clicked, the system displays the *Create New Invention Report* screen.

NOTE: Creating an Invention Report is for users with the TTO Administrator and TTO User role.

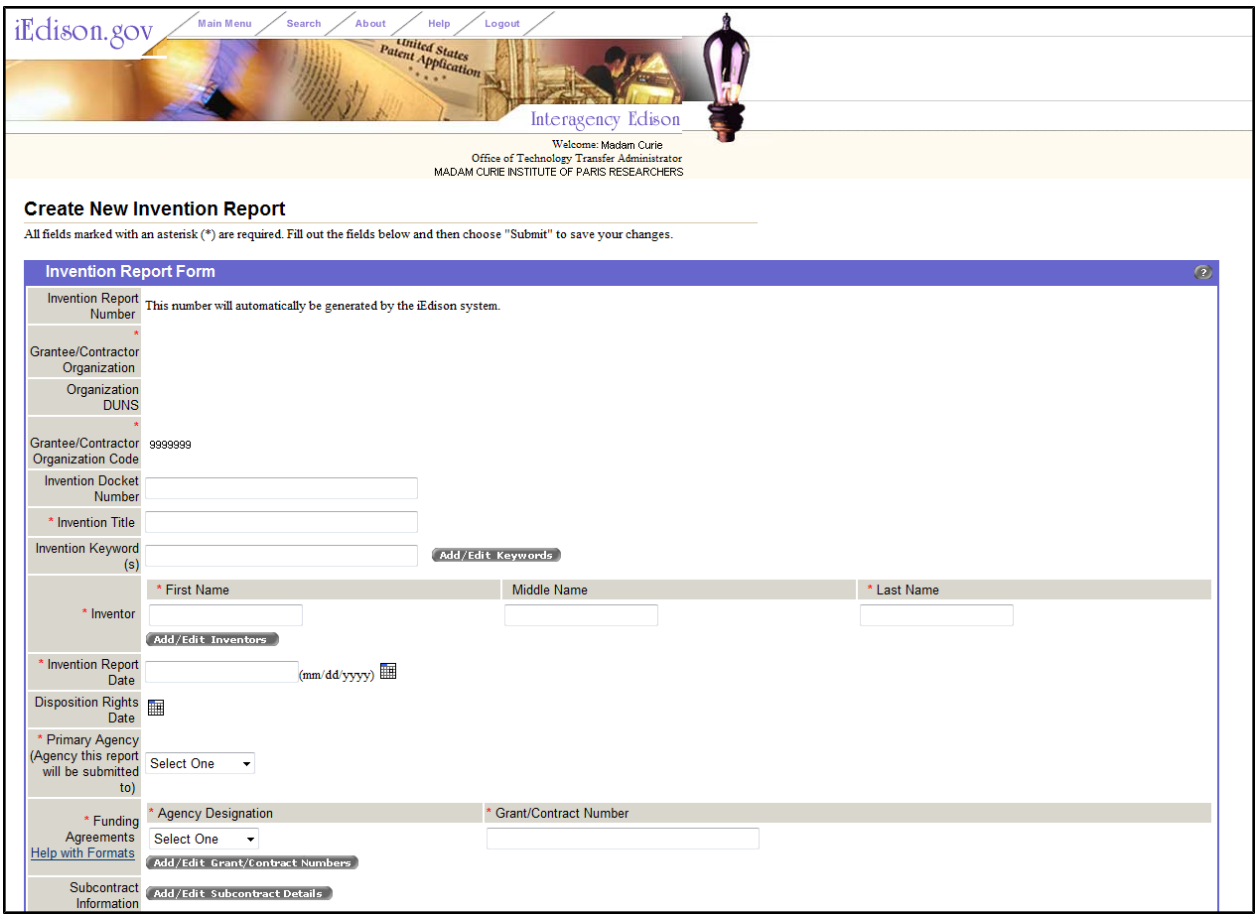

Figure 27: Top Half of the Create New Invention Report Screen

Subcontract Information: Add/Edit Subcontract Details
Title Extension Years: 0
One Year Extension to File Initial Patent Application: No / Yes
Date of First Publication, Sale, or Public Use: (mm/dd/yyyy)
Explanatory Notes
Title Election Date: (mm/dd/yyyy)
* Invention Status: Under Evaluation
Not Elect Title Reason: Select One
Not Elect Title Other Reason
Name of Third Party to Which Title is Waived
Waiver Date: (mm/dd/yyyy)
Final Invention Rights Determination
Parent Invention Report Number
Organization Code for Other Organizations to View Invention and Related Patents
Invention Disclosure Document Type: Select One
Invention Disclosure File Location: To appropriately protect Personally Identifiable Information (PII) of your staff/personnel, you should review your submissions and redact information as appropriate prior to submitting to iEdison. **Please include a permanent identifying number within the uploaded disclosure (e.g. iEdison Invention Report [EIR] Number: XXXXXXX-XX-XXXX) to permanently associate the upload with the iEdison Invention Report record.** Browse...
Invention Disclosure Text: To add a text file, paste a document here. Use ASCII text only. Maximum of 20 pages; text will be truncated if it is longer.
Invention Disclosure Receipt Date
Invention Disclosure Reject Date
Invention Disclosure Reject Comment
Upload Other Document: **Please click on the file name to view.**

* Document Name	File Name	* File Location	* File Type	* Document Category	Creator	Create Date	Last Update User	Last Update Date	Delete
		Browse...	Select One	Select One					

*** Any uploaded documents will be visible to all agencies that have funded the Invention.**
*** Upon uploading each document, in order to complete the reporting submission, you must also send an email to the Primary Agency identifying the type of document uploaded and the associated EIR Invention Record or Patent Record.**
*** Maximum 20 documents can be uploaded.**

Submit Cancel

Home | Main Menu | Search | Change Password | About | Help | Logout
E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice
IEDISON-2000

Figure 28: Bottom Half of the Create New Invention Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

2. Enter invention report information, noting the following:
    a. Fields with an asterisk (*) are required.
    b. Additional keywords can be added via the **Add/Edit Keywords** button. Please see the Add/Modify Keywords for an Invention Report topic.
    c. Additional inventors can be added via the **Add/Edit Inventors** button. Please see the Add/Modify Inventors for an Invention Report topic.
    d. Additional grant or contract numbers can be added via the **Add/Edit Grant/Contract Numbers** button. Please see the Add/Edit Funding Agreement (e.g. Grant/Contract Numbers) for an Invention Report topic.
    e. Subcontractors can be added via the **Add/Edit Subcontractor Details** button. Please see Add/Modify Subcontractor Details topic for an Invention Report.
    f. An invention disclosure document should added/modified.
        i. Add the Extramural Invention Report (EIR) number and submit (save) the report first before uploading the invention disclosure document.
        ii. Please see the Add/Modify an Electronic Version of an Invention Disclosure Document topic.
    g. Invention Disclosure documents can be viewed. Please see the View an Invention Disclosure Document topic.
    h. To add other documents, please refer to the Add Other Documents topic.
3. Perform one of the following options:
    a. Click the **Submit** button to submit the information. The invention report is created and the *Invention Report Verification* screen is displayed.
    b. Click the **Cancel** button to cancel creating a new invention report.

When the **Cancel** button is clicked, any changes that were made are not saved and the *Main Menu* screen is re-displayed.

When the **Submit** button is clicked, the file is uploaded and the *Invention Report Verification* screen is displayed.

NOTE: If the **Submit** button is not clicked, the data entered is not saved in the system.

---

4. Perform one of the following options on the *Invention Report Verification* screen:
    a. Click the **Submit** button to accept the information as it is displayed on the verification screen.
    b. Click the **Modify Invention Report** button to return to the previous screen and modify the invention report.

When the **Submit** button is clicked, the *Create New Invention Report Confirmation* screen is displayed confirming the invention report was saved to the database with the assignment of a

permanent invention report number or EIR number and allowing you to add another invention report.

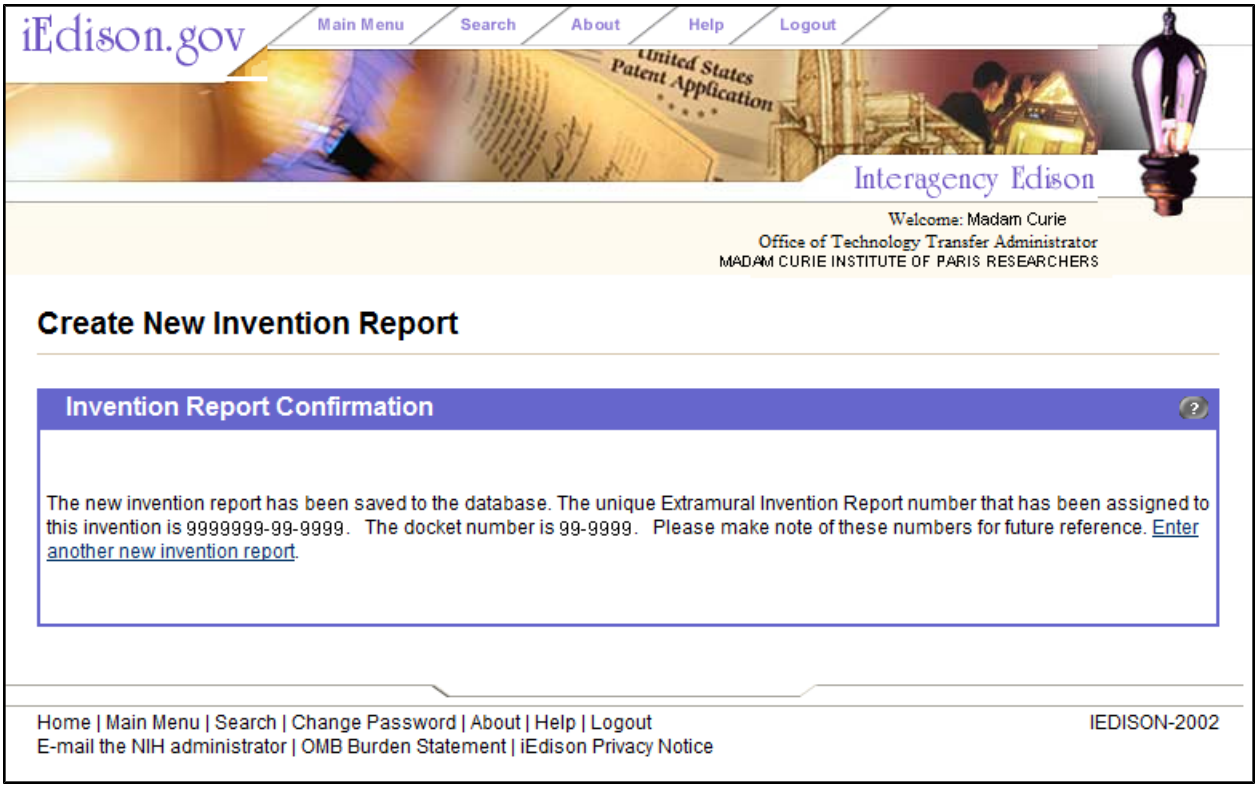

Figure 29: Create New Invention Report Confirmation Screen

6.1.1 Search for an Invention Report

The search fields on the *Invention Report Search* screen are all optional. Any desired combination of the fields can be used to perform the invention report search.

To search for an invention report:

1. Select **Main Menu** tab.
2. Select the **Search/Modify Existing Invention Reports** hyperlink to access the *Invention Report Search* screen.

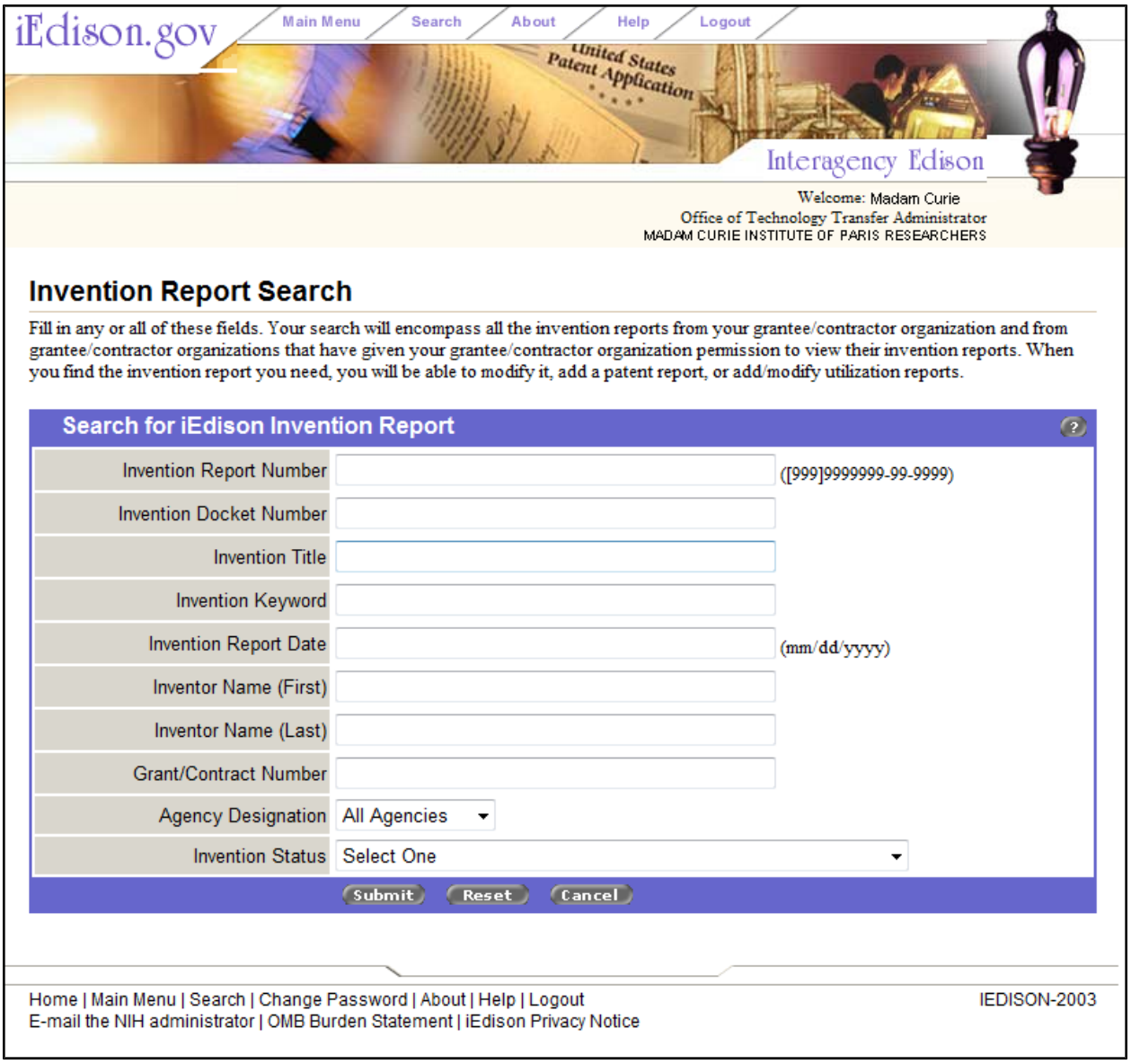

Figure 30: Invention Report Search Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

NOTE: Your search encompasses all the invention reports from your organization and from other grantee or contractor organizations that have given your organization permission to view any invention reports that they are handling reporting compliance for or that may be co-owned (e.g., collaborating inventors).

You may use wild cards (%) to perform sub-string searches within your allowed search range (e.g., for Grant/Contract number you could use R%CA123456 to search for awards that had a Funding Agreement starting with R and then containing one or more other characters before ending with CA123456.

Invention Reports are search-able by the inventors first and last name. Any combination of upper and lower case letters may be used in this field. Using an inventor's full name when creating an Invention Report yields more accurate results when searching Invention Reports by inventors.

3. Enter the desired search information.
4. Perform one of the following options:
    a. Click the **Submit** button to enter the search and open the *Invention Report Search Results* screen.
    b. Click the **Reset** button to clear the search criteria.
    c. Click the **Cancel** button to return to the *Main Menu* screen.

NOTE: If an invention's status is *Licensed as an Unpatented Biological Material or Research Tool*, the invention does not display in the search results.

When the **Submit** button is clicked, the system displays a list of matching invention reports.

iEdison.gov

Main Menu | Search | About | Help | Logout

Interagency Edison

Welcome: Madam Curie
Office of Technology Transfer Administrator
MADAM CURIE INSTITUTE OF PARIS RESEARCHERS

Invention Report Search

Choose "Add Patent Report" to add a new patent report to the selected invention report. Choose "Modify Invention Report" to modify the selected invention report.

Results for Invention Report Search

1 - 2 out of 2 records

Invention Title	Immune suppressive CD71+ Ter+ erythroid cells compromise neonatal host defense against infection			
Invention Docket Number	9999-9999	Invention Report Number	9999999-99-9999	
Primary Agency	NIH	Invention Report Date	04/08/2013	Add Patent Report Modify Invention Report Manage Utilization Reports
Invention Status	Elect Title			

Invention Title	Rational development of compounds with Vav3 inhibitory activity			
Invention Docket Number	9999-9999	Invention Report Number	9999999-99-9999	
Primary Agency	NIH	Invention Report Date	04/04/2013	Add Patent Report Modify Invention Report
Invention Status	Under Evaluation			

1 - 2 out of 2 records

Sort Criteria

Primary Sort Option	Title	Ascending: ◉	Descending: ○
Secondary Sort Option	None	Ascending: ○	Descending: ○
Tertiary Sort Option	None	Ascending: ○	Descending: ○

Submit | Return to Search Screen

Home | Main Menu | Search | Change Password | About | Help | Logout
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IEDISON-2004

Figure 31: Invention Report Search Screen Displaying Search Results

Results are sorted alphabetically by **Invention Title** in ascending order. The search results can be sorted by using the sort fields in the *Sort Criteria* section.

To move forward or backwards in the search results, the **Page Number**, **Prev**, and/or **Next** hyperlinks can be clicked. There navigation hyperlinks do not show if less than ten records are displayed.

Figure 32: Invention Report Search Results Navigation Buttons

5. To add a Patent Report, click the **Add Patent Report** button for the appropriate invention. Please see the Add a New Patent Report topic.
6. To modify an Invention Report, click the **Modify Invention Report** button to view or make modifications to the selected invention report. Please see the Modify an Invention Report topic.
7. To manage Utilization Reports, click the **Manage Utilization Reports** button. Please see the Modify Utilization Report topic.
8. To return to the *Invention Report Search* screen, click the **Return to Search Screen** button.

6.1.2 Modify an Invention Report

1. To view and modify an Invention Report, search for and select the appropriate Invention Report. Please refer to the Search for an Invention Report topic.

NOTE: The associated Patent Reports' statuses must be *Waived* before an Invention Report's status can be changed to one of the *Not Elect Title* statuses.
If the patents are not in a *Waived* status, the system displays the following error message when the **Submit** button is clicked: *This invention record cannot be waived until associated Patents are waived*.

When the **Modify Invention Report** button is clicked for the appropriate Invention Report on the *Invention Report Search* screen results, the system displays the *Modify Invention Report* screen.

iEdison.gov

Interagency Edison

COMMONS\BURDICK_PAM01 | Pamela Burdick Office of Technology Transfer Administrator

Main Menu | Search Inventions | Search Patents | Search Utilization | Search Documents | Search iEdison Account | About | Help | Logout

Modify Invention Report

All fields marked with an asterisk (*) are required. Fill out the fields below and then choose "Submit" to save your changes.

View Invention/Patent Tree: Vertical Horizontal

Invention Report Form

Invention Report Number	7654321-14-0006
* Grantee/Contractor Organization	DAN'S INSTITUTION
Organization DUNS	123456789
* Grantee/Contractor Organization Code	7654321
Invention Docket Number	Test-2014
* Invention Title	Harry's Test Record
Invention Keyword(s)	Add/Edit Keywords
* Inventor	* First Name: Harry; Middle Name: ; * Last Name: White — Add/Edit Inventors
* Invention Report Date	12/29/2014
Disposition Rights Date	
* Primary Agency (Agency this report will be submitted to)	NIH
* Funding Agreements Help with Formats	* Agency Designation: NIH; * Grant/Contract Number: NS000000 — Add/Edit Grant/Contract Numbers
Subcontract Information	Add/Edit Subcontract Details
Title Extension Years	0
One Year Extension to File Initial Patent Application	◉ No ○ Yes
Date of First Publication, Sale, or Public Use	(mm/dd/yyyy)

Figure 33: Top Half of the Modify Invention Report Screen

By: BINGAMANL
On: 2014-12-29

Test 1

Explanatory Notes By: BURDICK_PAM01
On: 2015-04-30

Test 2

Title Election Date 12/30/2014

* Invention Status Elect Title

Not Elect Title Reason Select One

Not Elect Title Other Reason

Name of Third Party to Which Title is Waived

Waiver Date MM/DD/YYYY

Final Invention Rights Determination

Parent Invention Report Number

Organization Code for Other Organizations to View Invention and Related Patents

Current Invention Disclosure View Current Document
Entering or uploading a revised report, using the fields below, will replace the current report.

Invention Disclosure Document Type Select One

Invention Disclosure File Location To appropriately protect Personally Identifiable Information (PII) of your staff/personnel, you should review your submissions and redact information as appropriate prior to submitting to iEdison.
Please include a permanent identifying number within the uploaded disclosure (e.g. iEdison Invention Report [EIR] Number: XXXXXXX-XX-XXXX) to permanently associate the upload with the iEdison Invention Report record.
Browse...

Invention Disclosure Text To add a text file or change the current text file, paste a document here. To see the current text file, click "View Document". Use ASCII text only. Maximum of 20 pages; text will be truncated if it is longer.

Invention Disclosure Receipt Date 12/30/2014

Invention Disclosure Reject Date

Invention Disclosure Reject Comment

Upload Other Document **Please click on the file name to view.**

* Document Name	File Name	* File Location	* File Type	* Document Category	Creator	Create Date	Last Update User	Last Update Date	Delete
		Browse...	Select One	Select One					☐

*** Any uploaded documents will be visible to all agencies that have funded the Invention.**
*** Upon uploading each document, in order to complete the reporting submission, you must also send an email to the Primary Agency identifying the type of document uploaded and the associated EIR Invention Record or Patent Record.**
*** Maximum 20 documents can be uploaded.**

Submit Cancel

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E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice | Feedback/Suggestions for iEdison

Figure 34: Bottom Half of the Modify Invention Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

2. Modify the invention report information, noting the following:
   a. Fields with an asterisk (*) are required.
   b. Additional keywords can be added via the **Add/Edit Keywords** button. Please see the Add/Modify Keywords for an Invention Report topic.
   c. Additional inventors can be added via the **Add/Edit Inventors** button. Please see the Add/Modify Inventors for an Invention Report topic.

d. Additional grant or contract numbers can be added via the **Add/Edit Grant/Contract Numbers** button. Please see the Add/Modify Grant/Contract Numbers for an Invention Report topic.
e. Subcontractors can be added via the **Add/Edit Subcontractor Details** button. Please see Add/Modify Subcontractor Details topic for an Invention Report.
f. Invention Disclosure documents can be added or modified. Please see the Add/Modify an Electronic Version of an Invention Disclosure Document topic.
g. Invention Disclosure documents can be viewed. Please see the View an Invention Disclosure Document topic.
h. To add other documents, please refer to the Add Other Documents topic.

3. Perform one of the following options:
   a. Click the **Submit** button to submit the information. The invention report is created and the *Create Invention Report Verification* screen is displayed.
   b. Click the **Cancel** button to cancel any changes.
4. Perform one of the following options on the *Invention Report Verification* screen:
   a. Click the **Submit** button to accept the information as it is displayed on the verification screen.
   b. Click the **Modify Invention Report** button to return to the previous screen and modify the invention report.

NOTE: If the **Submit** button is not clicked, the data entered is not saved in the system.

When the **Submit** button is clicked on the *Invention Report Verification* screen and there are no error messages, the *Invention Report Modification Confirmation* screen is displayed confirming the invention report was saved to the database.

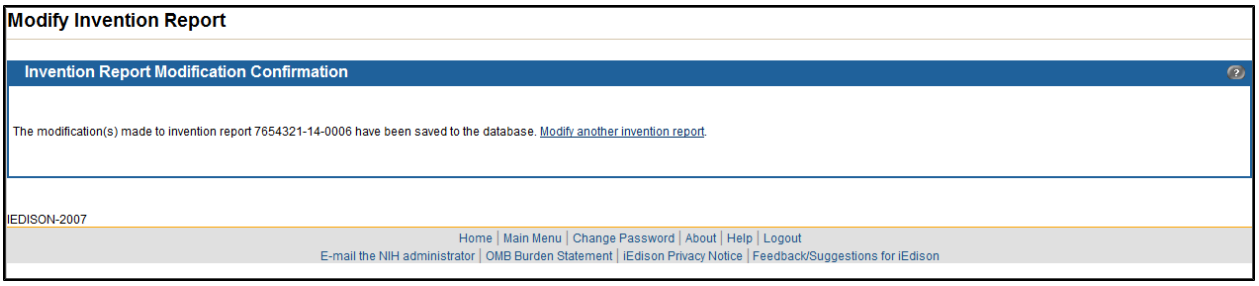

Figure 35: Modify Invention Report Confirmation Screen

5. To modify another invention report, click the **Modify another invention report** hyperlink.

6.1.3 Add/Modify Key Words for an Invention Report

The iEdison System allows up to 12 keywords to be associated with an invention report to help in searching for invention reports in the future. The *Create New Invention Report* screen or the

Modify Invention Report screen allows entry of the first keyword. Additional keywords may be added using the **Add/Edit Keywords** button.

1. On the *Create New Invention Report* or the *Modify Invention Report* screen, enter the first keyword in the **Invention Keyword(s)** field.
2. If you need to add/modify additional keywords, click **Add/Edit Keywords** button to access the *Add/Edit Keywords* screen.

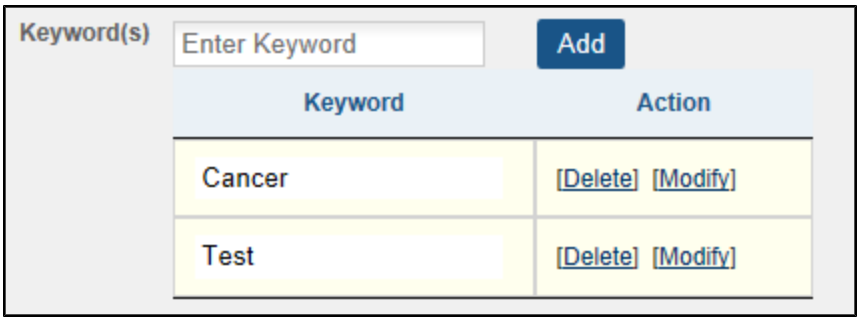

Figure 36: Add/Edit Keywords Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

3. Enter each keyword.

NOTE: The keyword entered on the create or modify screen is listed first on the *Add/Edit Keywords* screen.

4. Perform one of the following options:
   a. Click the **Submit** button to save the information.
   b. Click the **Cancel** button to cancel the addition/modification of keywords.

When the **Submit** button is clicked, the additional keyword information is saved and the Create or Modify screen is re-displayed, depending on whether you are creating or modifying an invention report.

When the **Cancel** button is clicked, any changes that were made are not saved and the Create or Modify screen is re-displayed, depending on whether you are creating or modifying an invention report.

6.1.4 Add/Modify Inventors for an Invention Report

The iEdison system allows up to 12 inventors to be associated with an invention report. Inventor details can be added using the **Add/Edit Inventor** button on the *Create New Invention Report* screen or the *Modify Invention Report* screen. The base screen allows entering the first inventor.

To add or modify inventors for an invention report:

1. On the *Create New Invention Report* screen, enter the first inventor in the **Inventor** field on the create screen.
2. If you need to add/modify additional inventors, click **Add/Edit Inventors** button on either the screen or the *Modify Invention Report* screen to access the *Add/Edit Inventors* supporting screen.

NOTE: First and last name are required.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

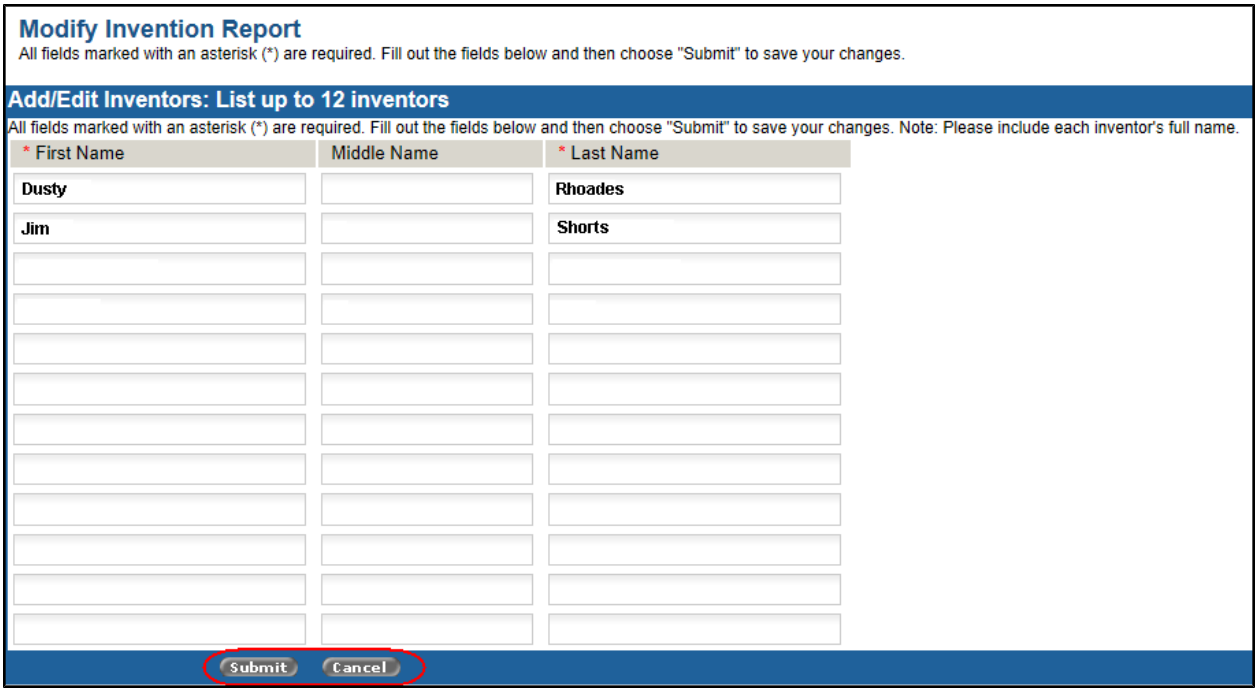

Figure 37: Add/Edit Inventors Screen for Inventions

NOTE: The inventor entered on the create or modify screen is listed first on the *Add/Edit Inventors* screen.

3. Perform one of the following options:
   a. Click the **Submit** button to save the information.
   b. Click the **Cancel** button to cancel the adding or modifying the additional inventors.

When the **Submit** button is clicked, the additional inventor information is saved and the Create or Modify screen is re- displayed, depending on whether you are adding or modifying an invention report.

When the **Cancel** button is clicked, any changes that were made are not saved and the screen or the *Modify Invention Report* screen is re-displayed, depending on whether you are adding or modifying an invention report.

6.1.5 Add/Edit Grant/Contract Numbers for an Invention Report

The iEdison system allows up to 12 grant/contract numbers to be associated with an invention report. All grant and contract numbers that contributed to the invention should be included.

The *Create New Invention Report* screen or the *Modify Invention Report* screen allows entry of the first grant/contract number. Additional grant/contract numbers can be added by clicking the **Add/Edit Grant/Contract Numbers** button.

To add or modify grant/contract numbers for an invention report:

1. On the *Create New Invention Report* or the *Modify Invention Report* screen, enter the appropriate grant/contract numbers.
2. If you need to add/modify additional grant/contract numbers, click the **Add/Edit Grant/Contract Numbers** button to access the *Add/Edit Grant/Contract Numbers* screen.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

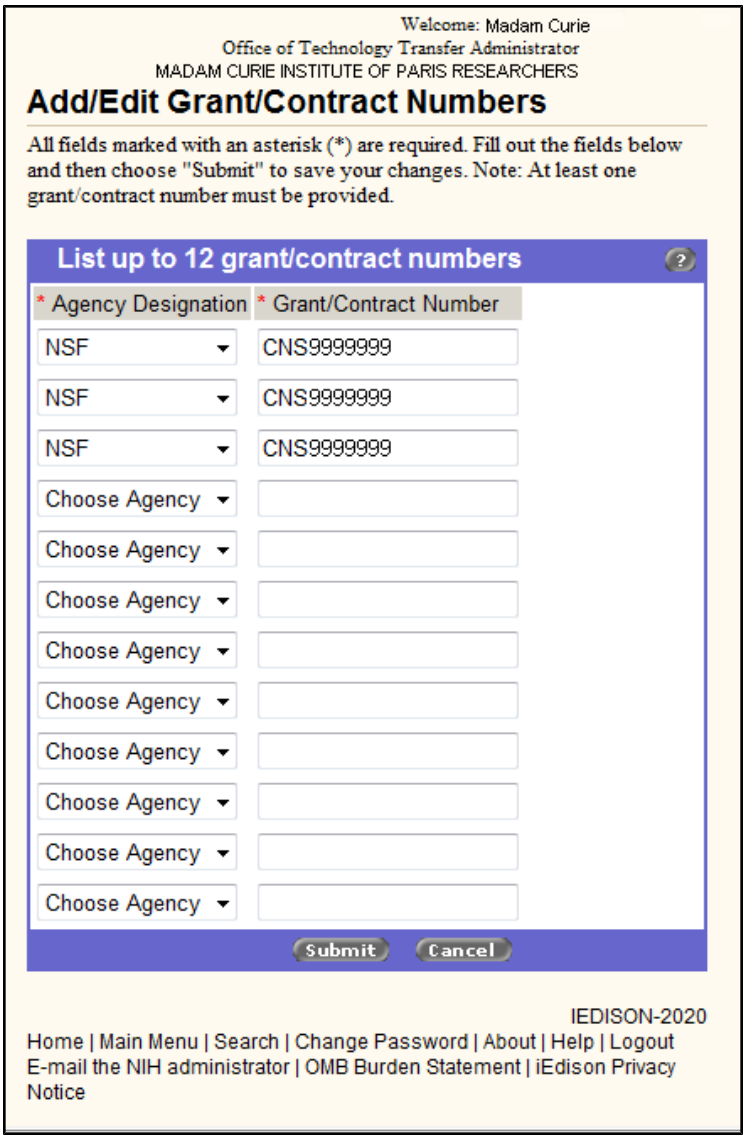

Figure 38: Add/Edit Grant/Contract Numbers Screen

3. Enter the supporting agency and grant/contract number for each additional funding agreement.

NOTE: The funding agreement entered on the create or modify screen is listed first on the *Add/Edit Grant/Contract Numbers* screen.

---

4. Perform one of the following options:
   a. Click the **Submit** button to save the information.
   b. Click the **Cancel** button to cancel the addition/modification of keywords.

When the **Submit** button is clicked, the additional grant/contract number information is saved and the Create or Modify screen is re-displayed, depending on whether you are adding or modifying an invention or patent report.

When the **Cancel** button is clicked, any changes that were made are ignored and the Create or Modify screen is re-displayed, depending on whether you are adding or modifying an invention or patent report.

6.1.6 Grant/Contract Number Formats

The following are the allowable grant and contract number formats that have been approved for use in the iEdison system for each Federal Agency:

Symbol or Character	Description
A	Any uppercase letter
B	Any digit or uppercase letter
# or \d	Any digit
L	Any digit or letter
<space>	A space character
-	A dash character
L+	Any digit or letter followed by any number of any digits or letters
"	A literal string; the quote marks themselves should be omitted
[]	Only one of the values within brackets is to be included, and the brackets themselves should be omitted
{}	Use in conjunction with \d or [] to indicate the number of characters.
()	An optional portion of the format; the content of the parentheses may be included or not; the parentheses themselves should be omitted.
/	Used within the brackets [ ] to represent OR for multiple character conditions

Table 2: Grant/Contract Format Legends

AFRL/RI

AFRL/RI	
F30602-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: F30602-45-d-5555
FA8750-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: FA8750-12-1-1234

Figure 39: AFRL/RL Grant Formats

AHRQ

AHRQ	
UC1 HS\d{5}	Example: UC1 HS12345
UC1 HS\d{6}	Example: UC1 HS123456
[A-Z]\d{2} [Hh][Ss]\d{5}	Example: B12 HS12345
[A-Z]\d{2} [Hh][Ss]\d{6}	Example: B12 HS123456

Figure 40: AHRQ Grant Formats

ARMY/ARL

ARMY/ARL		
DAAB07-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAB07-12-1-1234
DAAB08-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAB08-12-1-1234
DAAD05-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAD05-12-1-1234
DAAD17-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAD17-12-1-1234
DAAG39-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAG39-12-C-1234
DAAG46-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAG46-12-1-1234
DAAK20-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAK20-12-1-1234
DAAK21-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAK21-12-1-1234
DAAL01-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAL01-12-1-1234
DAAL02-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAL02-12-1-1234
DAAL04-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAL04-12-1-1234
DAAL07-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAL07-12-M-1234
W71B71-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	W71B71-12-P-1234
W71B7J-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	W71B7J-12-1-1234
W911QX-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	W911QX-12-1-1234

Figure 41: ARMY/ARL Grant Formats

ARMY/ARO

ARMY/ARO		
DAAD19-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAD19-12-1-1234
DAAG55-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAG55-12-1-1234
DAAH04-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAH04-12-1-1234
DAAL03-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAAL03-12-1-1234
DABT63-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DABT63-12-1-1234
DAMD17-\d{2}-[1239cCdDhgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAMD17-12-W-1234
W911NF-\d{2}-[1239cCdDgGhHjJkKmMpPvVwWzZ]-\d{4}	Example:	W911NF-12-G-1234

Figure 42: ARMY/ARO Grant Formats

ARMY/MRMC

ARMY/MRMC		
DAMD17-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DAMD17-12-1-1234
DAMD17-\d{2}-[123cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	DAMD17-12-Z-1234
W81XWH-\d{2}-[1239cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	W81XWH-12-1-1234

Figure 43: ARMY/MRMC Grant Formats

ARMY/SMDC

ARMY/SMDC		
DASG60-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DASG60-12-1-1234
W9113M-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	W9113M-12-1-1234

Figure 44: ARMY/SMDC Grant Formats

ARMY/SSC

ARMY/SSC		
DAAD15-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DAAD15-12-1-1234
DAAD16-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DAAD16-12-1-1234
DAAK60-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DAAK60-12-1-1234
DAAN02-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DAAN02-12-1-1234
DABJ37-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	DABJ37-12-1-1234
W58P05-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	W58P05-12-1-1234
W911QY-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	W911QY-12-1-1234
W912CG-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example:	W912CG-12-1-1234

Figure 45: ARMY/SSC Grant Formats

ATSDR

ATSDR		
CC[A-Z]\d{6}	Example:	CCB123456
[A-Z][A-Za-z0-9]\d{1}/AT[A-Z]\d{6}	Example:	B21/ATB123456
[A-Z][A-Za-z0-9]\d{1}/CC[A-Z]\d{6}	Example:	Bb1/CCB123456
[A-Z]\d{2} (OH|CE|CI|DP|EH|PH|PS)\d{5}	Example:	C11 CE12345
[A-Z]\d{2} (OH|CE|CI|DP|EH|PH|PS)\d{6}	Example:	C11 CE123456

Figure 46: ATSDR Grant Formats

CDC

CDC		
CC[A-Z]\d{6}	Example:	CCB123456
[A-Z][A-Za-z0-9]\d{1}/AT[A-Z]\d{6}	Example:	B21/ATB123456
[A-Z][A-Za-z0-9]\d{1}/CC[A-Z]\d{6}	Example:	Bb1/CCB123456
[A-Z]\d{2} (OH|CE|CI|DP|EH|PH|PS)\d{5}	Example:	C11 CE12345
[A-Z]\d{2} (OH|CE|CK|CI|DP|EH|PH|PS|TP)\d{6}	Example:	C11 CE123456
\d{3}-\d{4}-\d{5}	Example:	123-1234-12345

Figure 47: CDC Grant Formats

DHS/ST

DHS/ST	
2\d{3}-CI-\d{3}-\d{6}	Example: 2424-CI-646-557322
2\d{3}-IP-\d{3}-\d{6}	Example: 2764-IP-035-357923
2\d{3}-ST-\d{3}-\d{6}	Example: 2934-ST-832-811955
2\d{3}-[A-Z]{2}-\d{3}-[A-Z0-9]{3}\d{3}	Example: 2934-AB-832-811234
D\d{2}PC\d{5}	Example: D07PC12345, D55PC55555, D11PC54321
HSHQ(SL|DC|PD|VT)-\d{2}-[ABCDFJNPQRX93]-[a-zA-Z0-9]{5}	Example: HSHQSL-65-A-5A34D
HSSC[a-zA-Z0-9]{2}-\d{2}-[ABCDFJNPQRX93]-[a-zA-Z0-9]{5}	Example: HSSC6A-43-B-3FG85
N11PC\d{5}	Example: N11PC12345
NBCHC\d{6}	Example: NBCHC123456
W81XWH-\d{2}-9-\d{4}	Example: W81XWH-12-9-1234
\d{2}-[A-Za-z0-9]{1}-\d{3}	Example: 12-z-123

Figure 48: DHS/ST Grant Formats

DOD/DMEA

DOD/DMEA	
DMEA90-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: DMEA90-12-1-1234
F04606-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: F04606-12-1-1234
H94003-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: H94003-12-1-1234

Figure 49: DOD/DMEA Grant Formats

DOE

DOE	
DE-[A-Z]{2}\d{7}	Example: DE-AV1234567
LB03-000155	Example: LB03-000155
W-31-109-ENG-38/[a-zA-Z0-9]+	Example: W-31-109-ENG-38/A1254545761
W-7405-ENG-36	Example: W-7405-ENG-36
W-7405-ENG-36/.{14}	Example: W-7405-ENG-36/ABCDEF@1234567
W-7405-ENG-48	Example: W-7405-ENG-48
W-7405-ENG-48/.{14}	Example: W-7405-ENG-48/ABCDEF@1234567
W-7405-ENG-82	Example: W-7405-ENG-82
W-7405-ENG-82/.{14}	Example: W-7405-ENG-82/12GH34YU5IIO56
[A-Z]{2}-(AC|AM|AP|FC|FG)\d{2}-\d{2}[A-Z]{2}\d{5}/.{14}	Example: KS-AM12-23ED12345/12GH3$YU5IIO56
[A-Z]{2}-(AC|AM|FC|FG|PS)\d{2}-\d{2}[A-Z]{2}\d{5}	Example: DJ-FC23-12HT12345
[A-Z]{2}-AM\d{2}-\d{2}[A-Z]{2}\d{5}	Example: SJ-AM12-32UD12345
[A-Z]{2}-FG\d{2}-\d{2}R8\d{5}	Example: GD-FG12-12R812345
[A-Z]{2}-FG\d{2}-\d{2}R8\d{5}/.{14}	Example: GD-FG12-12R812345/GD#HD1234HD75T
[A-Z]{2}-\d{2}-[A-Z]-\d{2}-\d{4}	Example: SG-12-W-12-1234
[A-Z]{3}-[A-Z]{2}\d{7}	Example: ABC-AB1234567

Figure 50: DOE Grant Formats

EPA

EPA		
68-[WwCcDdRrSs]\d-\d{2}-\d{2}	Example:	68-W1-12-34
68-[WwCcDdRrSs]\d-\d{4}	Example:	68-W1-1234
68-[WwCcDd]-\d{2}-\d{2}	Example:	68-W-12-34
EP-[R|S]\d-\d{2}-\d{2}	Example:	EP-R1-12-12
EP-[W|D|C]-\d{2}-\d{3}	Example:	EP-D-12-123
EP[A-Za-z0-9]\d{2}-\d{6}	Example:	EPs12-123456
[A-Za-z0-9]\d{6}-\d{2}(-\d)?	Example:	B123456-12-1
[A-Za-z0-9]\d{8}(-\d)?	Example:	B12345678-1
[A-Za-z0-9]{2}\d{6}-\d{2}(-\d)?	Example:	A3123456-12-2
[A-Za-z0-9]{2}\d{8}(-\d)?	Example:	bB12345678-1
[A-Za-z][A-Za-z0-9]-\d{8}-[a-zA-Z0-9]	Example:	As-12345678-0

Figure 51: EPA Grant Formats

FDA

FDA		
[A-Z]\d{2} FD\d{6}	Example:	R01 FD123456
222-\d{2}-\d{4}	Example:	222-12-1234
223-\d{2}-\d{4}	Example:	223-12-1234
FD-R-\d{6}	Example:	FD-R-123456
FD-U-\d{6}	Example:	FD-U-123456
[A-Z]\d{2}[ ]FD\d{6}	Example:	R01 FD123456

Figure 52: FDA Grant Formats

IHS

IHS		
\d[A-Z]\d[A-Z0-9][ ]\d{2}[ ]\d{5}[ ]\d{2}	Example:	1B1C 12 12345 12
\d[A-Z]\d[A-Z0-9][ ]\d{2}[ ]\d{5}[ ]\d{2}[ ][A-Z]\d	Example:	1B11 12 12345 12 D1
\d{9}	Example:	123456789

Figure 53: IHS Grant Formats

NAVY/ONR

NAVY/ONR		
N00014-\d{2}-[123cCdDfFhHjJkKmMpPvVwW]-\d{4}/.{4}	Example:	N00014-12-w-1234/1234
N00014-\d{2}-[123cCdDgFfGhHjJkKmMpPvVwW]-[0-9G]\d{3}	Example:	N00014-12-1-G123
N00014-\d{2}-[123cCdDgFfGhHjJkKmMpPvVwW]-\d{4}	Example:	N00014-12-V-1234

Figure 54: NAVY/ONR Grant Formats

NIH

NIH	
([A-GI-NP-Z][A-GI-RT-Z]|O[A-GI-Z]|H[A-RT-Z]|[A-NP-Z]H|[A-GI-Z]S)\d{6}	Example: DK012345
HHSN26[013456789]\d{5}	Example: HHSN26912345
HHSN26[013456789]\d{9}[CPE]	Example: HHSN260123456789C
HHSN27[1234568]\d{5}	Example: HHSN27412345
HHSN27[1234568]\d{9}[CPI]	Example: HHSN278123456789P
HHSN281\d{5}	Example: HHSN28112345
HHSN281\d{9}[CP]	Example: HHSN281123456789C
HHSN29[12]\d{5}	Example: HHSN29212345
HHSN29[12]\d{9}[CP]	Example: HHSN292123456789C
HHSN30\d{10}[CP]	Example: HHSN305123456789C
HHSN30\d{6}	Example: HHSN30412345
HHSN31[12345678]\d{5}	Example: HHSN31412345
HHSN31[12345678]\d{9}[CP]	Example: HHSN314123456789C
N01 CO012400/+	Example: N01 CO012400/SUBCONTRACT NUMBER
[A-Z]\d{2} ([A-GI-NP-Z][A-GI-RT-Z]|O[A-GI-Z]|H[A-RT-Z]|[A-NP-Z]H|[A-GI-Z]S)\d{6}	Example: R01 DK012345

Figure 55: NIH Grant Formats

NIST

NIST		
50[A-Z]{2}NB\d{6}	Example:	50WDNB123456
60NANB\d{2}D\d{3}	Example:	60NANB10D123
70NANB\dH\d{4}	Example:	70NANB1H1234
70NANB\d{2}H\d{3}	Example:	70NANB12H123
SB[A-Za-z0-9]{4}\d{2}[A-Z]\d{4}	Example:	SBBCDE22B2222
SB\d{6}[A-Z]\d{4}	Example:	SB222222B2222
[A-Z]{2}1341\d{2}CN\d{4}	Example:	EW134188CN1234
[A-Za-z0-9]{6}\d(\d)?[A-Za-z0-9]\d{4}(\d{5})?	Example:	BC12DE1X1234
\d[A-Z]\d{4}	Example:	1E1234
\d{2}[A-Z]{4}\d[A-Z]\d{4}	Example:	12SEDS3S1234
\d{2}[A-Z]{4}\d[A-Z]{2}\d{3}	Example:	12HUWE2SD123

Figure 56: NIST Grant Formats

NOAA

NOAA		
50DG[A-Z]{2}\d{6}	Example:	50DGBC123456
50DKN[A-Z]\d{6}	Example:	50DKNF123456
50[A-Z]{2}NA\d{6}	Example:	50WSNA123456
ADP50DD[A-Z]{2}\d{6}	Example:	ADP50DDBB123456
NA\d{2}[A-Z]{3}\d{7}	Example:	NA12DCE1234567
NA\d{2}[A-Za-z0-9]{2}\d{4}	Example:	NA12bC1234
[A-Z]{2}1330\d{2}CN\d{4}	Example:	TE133089CN1234

Figure 57: NOAA Grant Formats

NSF

NSF		
[A-Z]{3}\d{7}	Example:	BCD1234567
[A-Z]{4}\d{7}	Example:	BCDE1234567
\d{7}	Example:	1234567

Figure 58: NSF Grant Formats

OTHER

OTHER		
.+	Example:	DDD39820#*S9

Figure 59: OTHER Grant Formats

USAF/AFOSR

USAF/AFOSR	
F49620-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: F49620-96-D-1234
FA8655-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: FA8655-96-D-1234
FA9550-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: FA9550-96-D-1234

Figure 60: USAF/AFOSR Grant Formats

AFMCL/JAZ

AFMCLO/JAZ	
F04606-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F04606-12-d-1234
F04611-\d{2}-[123cCdDhHjJkKmMpPvVwW]-[A-Z0-9]\d{3}	Example: F04611-12-2-D345
F04735-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F04735-12-M-1234
F19628-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: F19628-08-C-1234
F19628-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F19628-12-W-1234
F19628-\d{2}-[123cCdDhHjJkKmMpPvVwW][A-Z]-\d{3}/[a-zA-Z0-9\-]+	Example: F19628-12-3G-123
F19650-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F19650-12-k-1234
F29601-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F29601-12-M-1234
F336(0|1)-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: FA3360-01-D-1234/32-FFS
F33615-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F33615-12-W-1234
F33657-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F33657-12-W-1234
F41624-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F41624-12-M-1234/EW3-FF3
F43601-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: F43601-12-M-1234
FA8620-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: FA8620-12-W-1234/544-FGD
FA8650-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}	Example: FA8650-10-W-1234
FA8650-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: FA8650-12-W-1234/541-AWS
FA8651-\d{2}-[123cCdDhHjJkKmMpPvVwW]-\d{4}/[a-zA-Z0-9\-]+	Example: FA8651-12-M-1234

Figure 61: AFMCLO/JAZ Grant Formats

USAID

USAID		
AID-OAA-F-13-00083	Example:	AID-OAA-F-13-00083
[A-Z]{3}-00-[GCQ]-\d{2}-\d{5}	Example:	BBB-00-Q-01-12345
[A-Za-z0-9]{3}-[A-Z]-\d{2}-\d{5}-\d{2}	Example:	bbb-B-12-12345-12
[A-Za-z0-9]{3}-\d{4}[A-Z]-\d{2}-\d{3}-\d{2}	Example:	ASD-1234B-12-123-12

Figure 62: USAID Grant Formats

USDA/ARS

USDA/ARS		
4([0-9]|[1-2][0-9]|[3][0-5])-[A-za-z0-9]{4}-[A-za-z0-9]-[A-za-z0-9]{4}	Example:	434-abcd-a-abcd
58-[A-za-z0-9]{4}-[A-za-z0-9]M-F[A-za-z0-9]{3}	Example:	58-abcd-aM-Fabc
58-[A-za-z0-9]{4}-[A-za-z0-9]M-[A-za-z0-9]{3}	Example:	58-abcd-aM-abc
59-3601-3-315/\d-\d{2}-\d{2}[a-zA-Z0-9]	Example:	59-3601-3-315/1-34-56A
59-3601-3-315/\d{2}-\d-\d{2}[a-zA-Z0-9]	Example:	59-3601-3-315/12-4-567
59-3601-3-315}/\d{2}-\d{2}-\d{2}[A-Za-z0-9]	Example:	59-3601-3-315/12-34-567
5[89]-[A-Za-z0-9]{4}-[A-Za-z0-9]-F[A-Za-z0-9]{3}	Example:	59-abcd-a-Fabc
5[89]-[A-Za-z0-9]{4}-[A-Za-z0-9]-[A-Za-z0-9]-[A-Za-z0-9]{3}	Example:	59-81S7-D-3-DF2
5[89]-[A-Za-z0-9]{4}-[A-Za-z0-9]-[A-Za-z0-9]{3}	Example:	59-81S7-D-DF2
5[89]-[A-Za-z0-9]{4}-[A-Za-z0-9]-[A-Za-z0-9]{3}/\d-\d-\d{2}[a-zA-Z0-9]	Example:	59-3R01-A-2Y5/1-3-57A
[5][034]-[A-za-z0-9]{4}-[A-za-z0-9]-[A-za-z0-9]{4}	Example:	53-abcd-a-abc1

Figure 63: USDA/ARS Grant Formats

USDA/NIFA

USDA/NIFA	
199[8-9]-\d{5}-\d{5}	Example: 1998-12345-12345
2\d{3}-ZZZZZ-ZZZZZ/[a-zA-Z0-9]+	Example: 2009-ZZZZZ-ZZZZZ/PROJECTNUMBER
2\d{3}-\d{5}-\d{5}	Example: 2008-12345-12345
2\d{3}-\d{5}-\d{5}/[a-zA-Z0-9]+	Example: 2010-12345-12345/PROJECTNUMBER
NA/[A-Za-z0-9-]{3,}	Example: NA/aBc
XX-ZZZZ-Z-ZZZZ/[a-zA-Z0-9]+	Example: XX-ZZZZ-Z-ZZZZ/PROJECTNUMBER
XX-[A-Z]{4}-\d-\d{4}	Example: XX-BCDE-1-1234
XX-[A-Z]{4}-\d-\d{4}/[a-zA-Z0-9]+	Example: XX-BCDE-1-1234/PROJECTNUMBER
XX-[A-Za-z0-9]{4}-\d-\d{4}	Example: XX-BC12-1-1234
ZZ-ZZZZ-Z-ZZZZ/[a-zA-Z0-9]+	Example: ZZ-ZZZZ-Z-ZZZZ/PROJECTNUMBER
\d{2}-[A-Z]{4}-\d-\d{4}	Example: 12-SDFG-1-1234
\d{2}-[A-Z]{4}-\d-\d{4}/[a-zA-Z0-9]+	Example: 12-BCDE-1-1234/PROJECTNUMBER
\d{2}-[A-Za-z0-9]{4}-\d-\d{4}	Example: 12-aBcD-1-1234
\d{2}-\d{5}-\d{4}	Example: 12-12345-1234

Figure 64: USDA/NIFA Grant Formats

USDA/FS

USDA/FS		
4[0-3]-[A-Za-z0-9]{4}-\d-\d{4}	Example:	43-A2WE-2-1234
5[2-5]-[A-Za-z0-9]{4}-\d{2}-\d{2}	Example:	53-SDWX-12-12
9\d{1}-CA-\d{4}	Example:	99-CA-1234
9\d{1}-CC-\d{4}	Example:	99-CC-1234
9\d{1}-CRADA-\d{4}	Example:	99-CRADA-1234
9\d{1}-RCRA-\d{4}	Example:	99-RCRA-1234
9\d{1}-RJVA-\d{4}	Example:	99-RJVA-1234
\d{2}-11\d{6}-\d{3}	Example:	24-11987654-123
\d{2}-[A-Za-z0-9]{2}-11\d{6}-\d{3}	Example:	12-SE-11345678-123

Figure 65: USDA/FS Grant Formats

DOD/DARPA

DOD/DARPA		
DARPA AWARD	Example:	DARPA AWARD
HR0011-\d{2}-[1239cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	HR0011-99-1-1234
MDA972-\d{2}-[1239cCdDhHjJkKmMpPvVwWzZ]-\d{4}	Example:	MDA972-04-2-1234
NBCH(A|C|D|F|P|1|2|3)\d{2}\d{4}	Example:	NBCHCF1234

Figure 66: DOD/DARPA Grant Formats

DOC/EDA

DOC/EDA	
50[A-Z]{2}ED\d{6}	Example: 50YTED123456
[A-Z]{2}1325\d{2}CN\d{4}	Example: EW123522CN1234
\d{11}	Example: 12345678901
\d{9}	Example: 123456789

Figure 67: DOC/EDA Grant Formats

DOC/ITA

DOC/ITA	
50[A-Z]{2}TA\d{6}	Example: 50BWTA123456
[A-Z]{2}1350\d{2}CN\d{4}	Example: AG135043CN1234
\d{2}-\d{4}	Example: 12-1234
\d{4}-\d{4}-\d{2}-\d{2}	Example: 1234-1234-12-12

Figure 68: DOC/ITA Grant Formats

DOT

DOT		
RITARS-\d{2}-H-[A-Z0-9]{3}	Example:	RITARS-14-H-A1B2
DTOS59-06-G-00033	Example:	DTOS59-06-G-00033
DTOS59-06-G-00039	Example:	DTOS59-06-G-00039
DTOS59-06-G-00043	Example:	DTOS59-06-G-00043
DTOS59-06-G-00046	Example:	DTOS59-06-G-00046
DTOS59-06-G-00047	Example:	DTOS59-06-G-00047
DTOS59-06-G-00048	Example:	DTOS59-06-G-00048
DTOS59-06-X-00619	Example:	DTOS59-06-X-00619
DTOS59-07-G-00047	Example:	DTOS59-07-G-00047
DTOS59-07-G-00050	Example:	DTOS59-07-G-00050
DTOS59-07-G-00051	Example:	DTOS59-07-G-00051
DTOS59-07-G-00052	Example:	DTOS59-07-G-00052
DTOS59-07-G-00053	Example:	DTOS59-07-G-00053
DTOS59-07-G-00054	Example:	DTOS59-07-G-00054
DTOS59-07-G-00055	Example:	DTOS59-07-G-00055
DTOS59-07-G-00056	Example:	DTOS59-07-G-00056
DTOS59-07-H-0001	Example:	DTOS59-07-H-0001
DTOS59-07-H-0002	Example:	DTOS59-07-H-0002
DTOS59-07-H-0003	Example:	DTOS59-07-H-0003
DTOS59-07-H-0004	Example:	DTOS59-07-H-0004
DTOS59-07-H-0005	Example:	DTOS59-07-H-0005
DTOS59-10-H-00001	Example:	DTOS59-10-H-00001

Figure 69: DOT Grant Formats

NRC

NRC		
NRC-[A-Za-z0-9]{2}-[A-Za-z0-9]{2}-[A-Za-z0-9]{4}	Example:	NRC-W2-3E-345F

Figure 70: NRC Grant Formats

DOD/DTRA

DOD/DTRA		
HDTRA1-\d{2}-1-\d{4}	Example:	HDTRA1-11-1-0123
\d{2}-\d{4}[MI]	Example:	10-1234M

Figure 71: DOD/DTRA Grant Formats

6.1.7 Add/Modify Subcontractor Details in an Invention Report

The iEdison system allows up to 4 subcontractors to be associated with an invention report. Subcontractor details can be added using the **Add/Edit Subcontractor Details** button on the *Create New Invention Report* screen or the *Modify Invention Report* screen.

To add or modify subcontractors for an invention report:

1. Click the **Add/Edit Subcontractor Details** button to access the *Create New Invention Report* screen or the *Modify Invention Report* screen.

NOTE: The subcontract number is a required field.

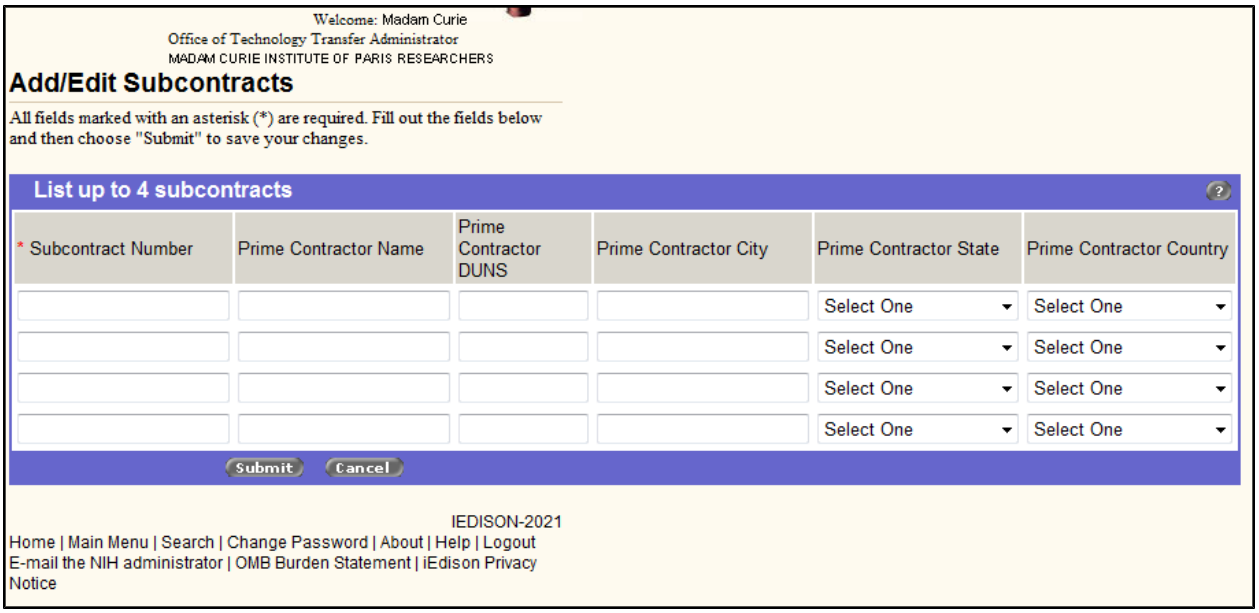

Figure 72: Add/Edit Subcontractors Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

2. Enter the subcontractor details for each subcontract.
3. Perform one of the following options:
    a. Click the Submit button to enter the information.
    b. Click the Cancel button to cancel the addition/modification of subcontract information.

When the **Submit** button is clicked, the subcontractor information is saved and the create or modify screen is displayed depending on whether you are adding or modifying an invention report.

When the **Cancel** button is clicked, any changes that were made are ignored and the Create or Modify screen is re-displayed depending on whether you are adding or modifying an invention report

6.1.8 Add Other Documents

1. To add Other Documents to an existing invention report record, search for and select the invention report as described in Search Invention Reports topic.

The *Modify Invention Report - Invention Report* screen is displayed.

Upload other documents as follows:

2. Scroll down to the *Upload Other Document* section.

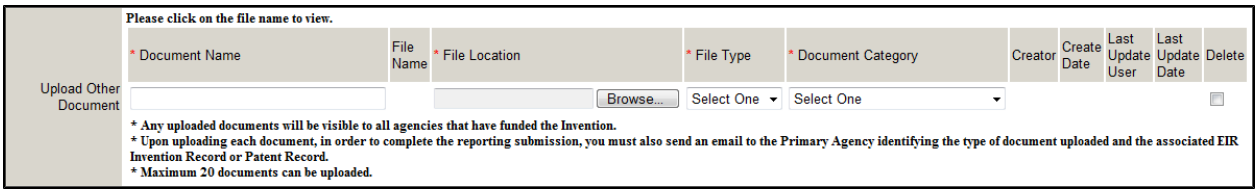

Figure 73: Upload Other Document Section

NOTE: Fields with an asterisk (*) are required.

3. Add the name of the other document to be uploaded in the field labeled **Document Name**.
4. Select the appropriate other Document type, either PDF or TIFF in the field **File Type** (PDF is preferable).
5. Click the **Browse** button to locate and select the document to be uploaded in the **File Location** field from your computer.

NOTE: File size is limited to 25 MB per upload.

6. Select the appropriate **Document Category** from the pull down menu.

NOTE: Document category choices are: *General*, *PTO Recordation*, *Nonpatented Research Resource*, or *Waiver*.

7. To delete a document before you have verified all information, click the box in the **Delete** field.
8. Perform on of the following options:
    a. Click the **Submit** button to submit the information.
    b. Click the **Cancel** button to cancel the document upload.

When the **Submit** button is clicked, the system saves the uploaded other document and any other information entered.

The *Create New Invention Report* screen or the *Modify Invention Report* screen is re-displayed, depending on whether you are creating or modifying an invention report. The **Upload Other Document** field includes the iEdison user name of the **Creator**, the **Create Date**, **Last Update User**, and **Last Update Date**.

9. Verify that all data regarding the uploaded document is entered correctly.
10. Perform one of the following options:
    a. Click the **Submit** button to submit the information.
    b. Click the **Modify Invention Report** button to make further changes.

When the **Submit** button is clicked, the system displays the *Invention Report Confirmation* screen upon successfully saving the uploaded other document.

Notes regarding the Upload Other Document feature:

1. Up to 20 other documents can be uploaded to an Invention Report.
2. Uploaded documents are visible to the Primary Agency and any agencies that have funded the invention.
3. After uploading a document, in order to complete the reporting submission, you must also send an email to the Primary Agency identifying the type of document uploaded and the associated EIR Invention Record or Patent Record.
    a. Primary Agency Contact information can be found from the iEdison *Home* screen.
    b. Please do NOT use the E-Mail the NIH Administrator hyperlink at the bottom of the screen to notify the Primary Agency.

6.1.9 Grant View Only Access to an Invention Report

The iEdison system allows you to grant *view only* access of an invention report to other reporting organizations with established iEdison Institution Profiles.

To grant *view-only* access, in the *Create New* or *Modify Invention Report* screen, enter the organization code for the organization you want to grant access to in the **Organization Code for Other Organizations to View Invention and Related Patents** field.

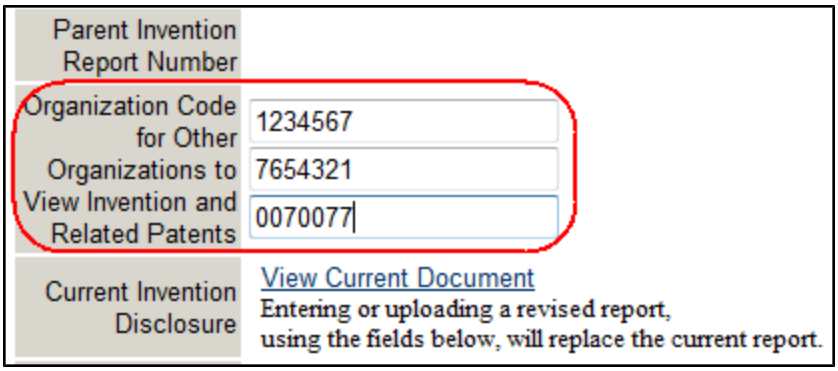

Figure 74: Example of Granting View Only Access

NOTE: The iEdison system allows up to three organizations to be granted view-only access.

6.1.10 Linking Parent Invention Reports

Designating of a parent or primary invention report can links child invention reports.

To link tow or more invention reports:

1. Search for the parent invention report as described in the Search for an Invention Report topic.

2. On the *Invention Report Search Results* screen, select the invention report that you would like to be the primary invention report.
3. Record the **Invention Report Number**.
4. Search for the child invention report as described in the Search for an Invention Report topic.
5. Enter the invention report number of the parent invention report into the **Parent Invention Report Number** field.
6. Click the **Submit** button.

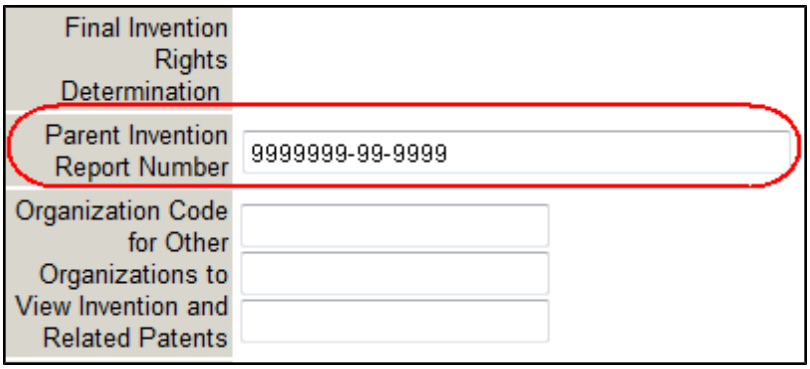

Figure 75: Parent Invention Report Number Field

6.1.11 Parent/Child Link Breakage Notification

If modifications are made to an Invention Report that result in the breaking an existing parent/child relationships, the iEdison system notifies the user and asks the user how to proceed. You can choose to submit the changes or return to the Invention Report Form. The notification wording is as follows:

You have made changes to this invention report disclosure report which would break existing parent/child relationships. Accept these changes and submit invention disclosure report, or return to the form and make changes.

1. Perform one of the following options:
   a. Click the **Submit Invention Report** button to submit the report with the broken parent/child relationship.
   b. Click the **Modify invention Report** button to correct the broken parent/child relationship.

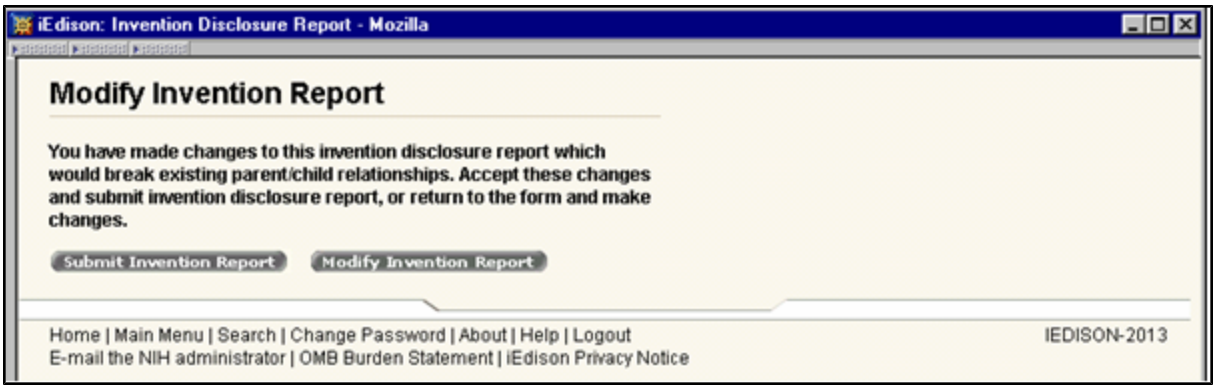

Figure 76: Modify Invention Report Screen

6.1.12 Review/Accept/Warning - Research Tools Guideline Agreement

6.1.12.1 Review/Accept

The research tools guidelines agreement can now be reviewed and accepted online. When submitting an invention report that is licensed as an unpatented biological material or research tool, the acceptance terms of a Research Tools Guidelines Agreement automatically displays prior to submission of the report when the status is modified to *Licensed as a Unpatented Biological Material or Research Tool*.

NOTE: This Invention Status can only be set if the primary agency is the following: **NIH**, **USDA/FS**, **USDA/ARS**, or **USDA/NIFA**.

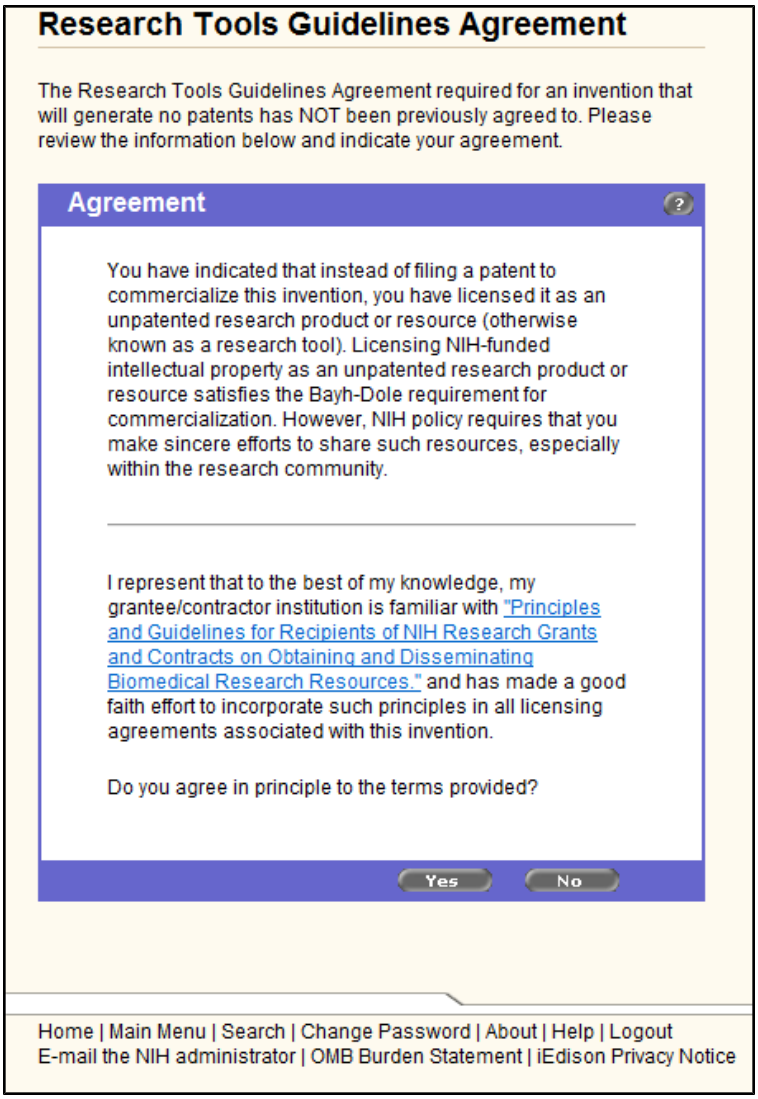

Figure 77: Research Tools Guidelines Agreement Screen

You must choose to accept or deny the agreement. To accept the terms of the agreement, click the **Yes** button. You are returned to the *Create New Invention Report* or the *Modify Invention Report* screen.

6.1.12.2 Warning

If you decline to accept the terms of the agreement by clicking the **No** button, the *Research Tools Guidelines Agreement s* screen displays with additional information regarding non-acceptance of the agreement. Click the **Return** button to the *Create New Invention Report* or the *Modify Invention Report* screen.

Figure 78: Research Tools Guidelines Agreement Warning Screen

6.1.13 Warnings/Errors when Creating or Modify Invention Reports

6.1.13.1 Not Elect Title with Patent Not Waived or Voided

If an attempt is made to change a NSF Invention Report's status to Not Elect Title, the system verifies that any Patents derived from the Invention Report are in a Waived or Voided status.

If there are any Patents that are NOT in a Waived or Voided status, the system displays the following error message: *This invention record cannot be waived until associated Patents are waived*.

6.1.13.2 Not Elect Title with Patent Waived or Voided

If there are Patents in a *Waived* or *Voided* status, the system verifies that certain notifications are not present.

- For the Inventions: 120 and/or 130
- For the associated Patents: 220, 221, 240, 223, and 234

If these notification exist, the system displays the following error messages: *The following notifications must be cleared before you may Not Elect Title to this invention: <EXTRAMURAL NOTIFICATION NUMBER>. Also, any messages suppressed by the institution also require resolution*.

6.1.13.3 Duplicate Title Notification

The iEdison system alerts the user if a duplicate invention title is submitted. The system attempts to identify what could be an inadvertent duplicate data entry error. However, the system does not reject the submission of two invention reports with the same invention title.

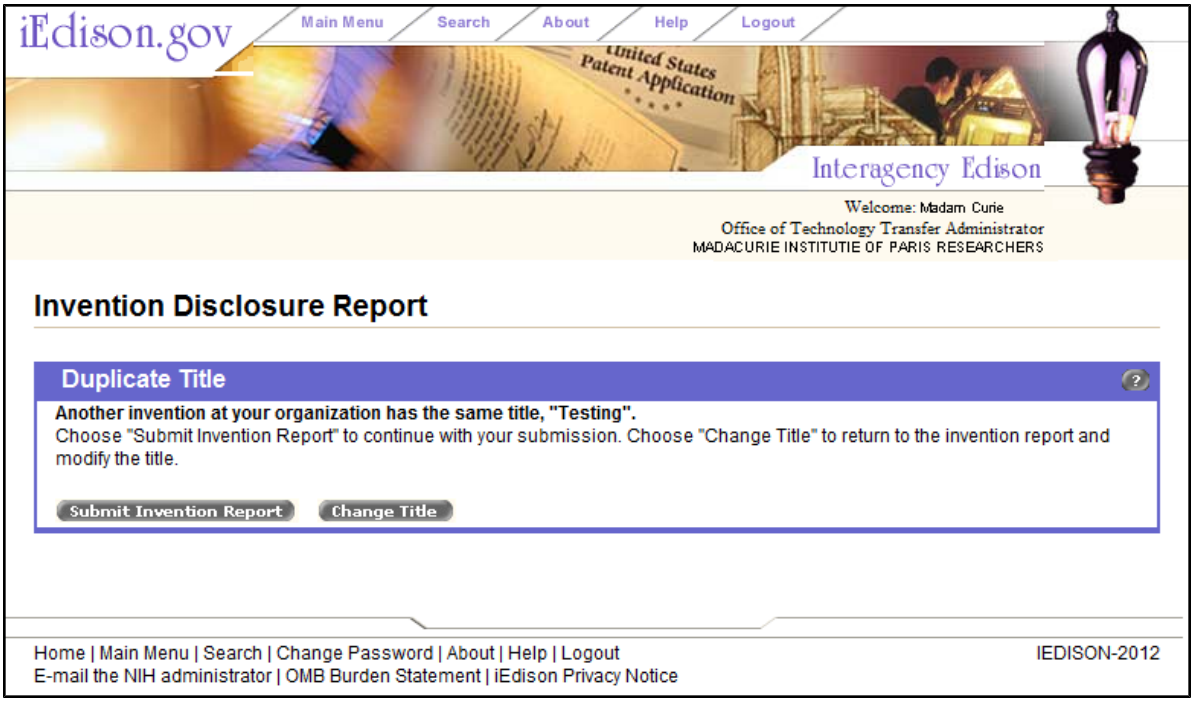

Figure 79: Invention Disclosure Report Duplicate Title Screen

6.1.13.4 Invention Report Date Notification Messages

The iEdison system notifies the user when an invention report date is entered that is greater than two months prior to the current date. Since most invention reports are reported within two months, this warning by the system is an attempt at identifying what could be an inadvertent data-entry error. However, the system does not reject the submission of an invention report with an invention report date greater than two months old.

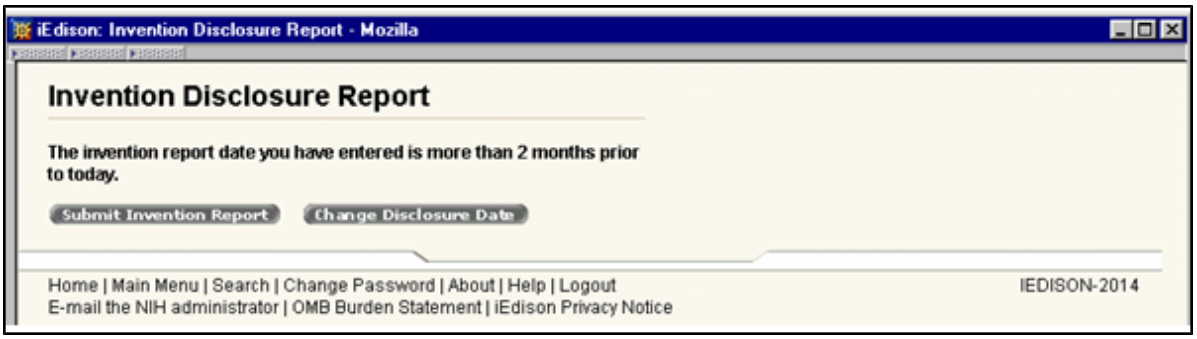

Figure 80: Invention Disclosure Report Screen Displaying Date Message

1. Perform one of the following options:
    a. Click the **Submit Invention Report** button to submit the report with the invention report date more than two months prior to today's date.
    b. Click the **Change Disclosure Date** button to correct the invention report date.

6.1.13.5 Title Election Date Notification Messages

The iEdison system notifies the user to enter a title election date that is greater than two years (plus any allowed extensions) from the current date. The warning displayed by the system is an attempt to identify what could be an inadvertent data entry error. However, the system does not reject the submission of an invention report with a title election date greater than two years old (plus any allowed extensions).

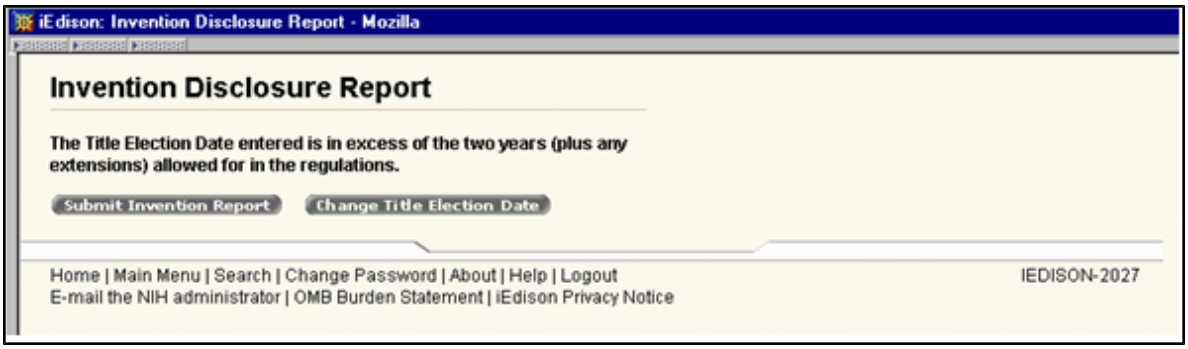

Figure 81: Invention Disclosure Report Screen Displaying Title Election Date Message

1. Perform one of the following options:
    a. Click the **Submit Invention Report** button to submit the report with the title election date two years in the future.
    b. Click the **Change Title Election Date** button to correct the title election date.

6.2 Uploading and Viewing Invention Disclosure Documents

TTO Administrators and TTO Users can electronically submit and view the invention disclosure documents in the iEdison system. Invention Disclosure documents can be submitted in four different formats:

- PDF – Portable Document Format
- TIFF - Tagged Image File Format
- Text – Paste ASCII text in the Invention Disclosure Text field

Please note the following items:

1. The **preferred method** is a PDF or TIFF document.
2. If no electronic PDF or TIFF documents are available and another electronic method is required by the funding agency, you may consider submitting ASCII text.

6.2.1 Add/Modify an Electronic Version of an Invention Disclosure Document

NOTE: It is recommended to create the Invention Report, add the Extramural Invention Report (EIR) number, and submit (save) the report first before uploading the invention disclosure document.

To add or modify an electronic version of an invention disclosure document:

1. Add/modify an invention report as described in the Add a New Invention Report topic and/or in the View/Modify an Invention Report topic.
2. Prior to submitting your changes:
   a. For PDF or TIFF invention disclosure documents, select the PDF or TIFF as the document type, click the **Browse** button, and select the file or type the file location in the **Invention Disclosure File Location** field.
   b. For Text invention disclosure documents, select *Text* as the document type, click the **Browse** button and select the file or type the file location in the **Invention Disclosure File Location** field OR cut and paste the text in the **Invention Disclosure Text** field.

NOTE: The Invention Report cannot be saved with out the invention disclosure document.
There is a maximum of 20 pages of text. Anything longer than 20 pages is truncated.
Please do not upload the invention disclosure document in the **Upload Other Documents** field.

4. Perform one of the following options:
   a. Click the **Submit** button to enter the information.
   b. Click the **Cancel** button to cancel the addition of invention disclosures.

When the **Cancel** button is clicked, any changes that were made are ignored and the Create or Modify screen is re-displayed, depending on whether you are adding or modifying an invention or patent report.

When the **Submit** button is clicked, the file is uploaded and a **View Current Document** hyperlink appears next to the **Current Invention Disclosure** field on the *Invention Report Verification* screen. Select this hyperlink to view the document.

Current Invention Disclosure	View Current Document Entering or uploading a revised report, using the fields below, will replace the current report.

Figure 82: View Current Document Hyperlink on the Invention Report Verification Screen

5. Perform one of the following options on the *Invention Report Verification* screen:
    a. Click the **Submit** button to accept the information as it is displayed on the *Invention Report Verification* screen.
    b. Click the **Modify Invention Report** button to return to the previous screen and modify the invention report.

When the **Submit** button is clicked, the *Invention Report Modification Confirmation* screen is displayed confirming the invention report was saved to the database.

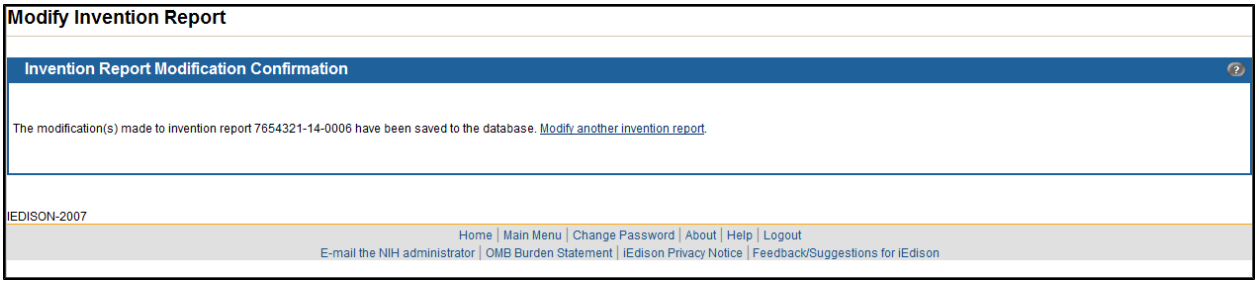

Figure 83: Modify Invention Report Confirmation Screen

6.2.2 View an Invention Disclosure Document

To view an invention disclosure document:

1. Add/Modify an invention report as described in the Add a New Invention Report topic and/or the View/Modify an Invention Report topic.
2. Prior to submitting your changes:
    a. Select the **View Current Document** hyperlink next to the **Current Invention Disclosure** field on the Create or Modify screen.

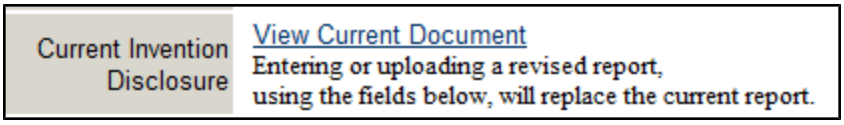

Figure 84: View Current Document Hyperlink for the Current Invention Disclosure

NOTE: For help viewing PDF or TIFF versions of the invention disclosure document, see the Troubleshooting the Viewing of PDF/TIFF Invention Disclosure Documents topic.

6.2.3 Trouble Shooting Viewing PDF/TIFF Invention Disclosure Documents

To troubleshoot viewing of PDF documents:

1. Verify a version of Adobe Reader is installed on your computer. Downloads of Adobe Reader can be found at http://www.adobe.com/support/downloads/main.html#Readers.
2. Click **Start -> Run** from the Windows menu bar.
3. Type *regedit* in the field provided.
4. Click the **OK** button. The *Registry Editor* window opens.
5. In the *Registry Editor* window, navigate to **My Computer -> HKEY_CLASSES_ROOT -> MIME -> Database ->Content Type -> application/pdf**.
6. Verify that *.pdf* is listed as the value next to **Extension**. If not, click on **Extension** and then click **Edit -> Modify** using the edit menu bar. Enter *.pdf* in the value data field and then click the **OK** button.

NOTE: If you continue to have problems viewing PDF invention disclosure documents, contact technical support at your organization.

To troubleshoot viewing of TIFF documents:

1. Verify a version of QuickTime is installed on your computer. Downloads of QuickTime can be found at http://www.apple.com/quicktime/download/.
2. Click **Start -> Settings -> Control Panel** from the Windows menu bar.
3. Double click on the **QuickTime** icon to open the *QuickTime Settings* window.
4. Select *Browser Plug-In* from the drop down field at the top of the window.
5. Click the **MIME Settings** button.
6. Click the **plus sign (+)** next to the *Images Header* to open the *Images* directory.
7. Check the box next to the **TIFF image file** field.
8. Click the **OK** button.

NOTE: If you continue to have problems viewing TIFF invention disclosure documents, contact technical support at your organization.

6.3 Bulk Uploads

6.3.1 Upload Invention Reports in a Data Stream

NOTE: The option to upload data streams is only displayed if the organization has been granted the ability to perform batch uploads by the NIH administrator.
For information on obtaining S2S credentials, please refer to the S2S Guide for eRA Web Services.

To upload invention reports into the iEdison system via a data stream:

1. Select **Main Menu** tab.
2. Select the **Upload iEdison Invention Report DataStream** hyperlink to access the *Upload iEdison Invention/Patent Reports - Select File to Upload* screen.

Figure 85: Upload iEdison Invention/Patent Reports - Select File to Upload Screen

3. Click the **Browse** button and select the file or type the file location in the path and file name field.
4. Click the **Submit** button.

When the **Submit** button is clicked, the *Submission Summary* screen is displayed indicating that the file was successfully uploaded and awaiting processing.

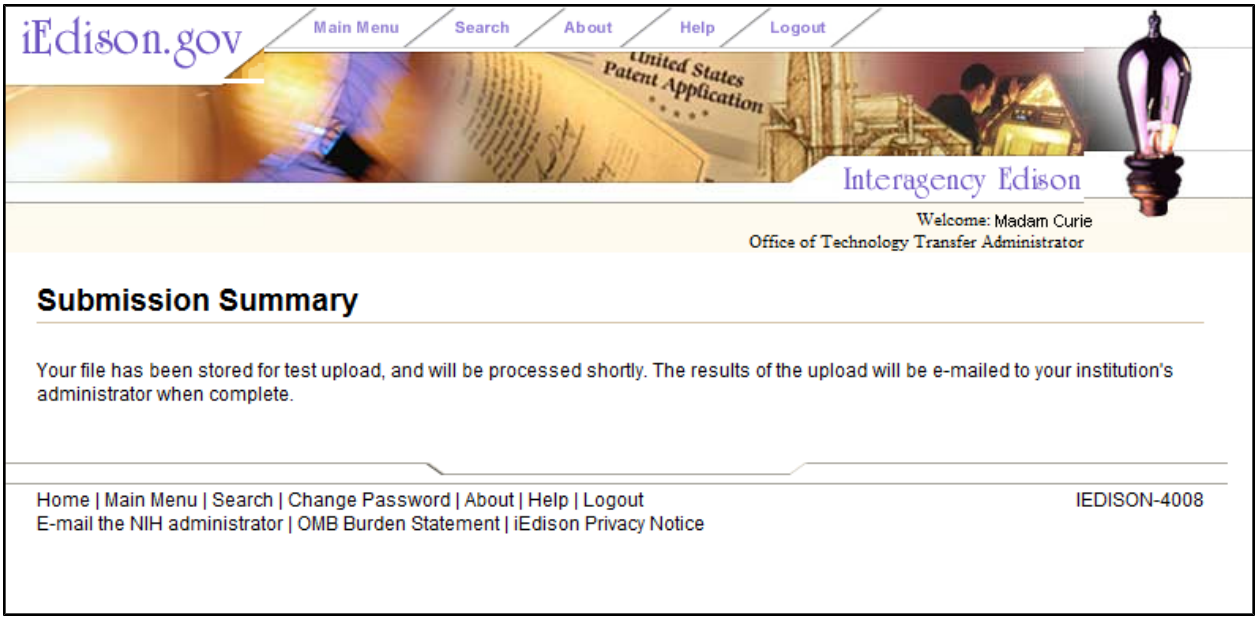

Figure 86: Submission Summary Screen

6.4 Record Locking

The following rules regarding record locking and invention reports are enforced in the iEdison system:

1. Only one user can update a given invention report at a time. Therefore, different users cannot update the same record simultaneously.
2. The same user cannot request a lock on more than one invention report at a time.
3. A lock is cleared after the following:
    a. Successful completion of a modification that updates the record
    b. When a record modification is canceled

   c. When the user is logged out of the system (regardless of whether the user requested to log out or the session timed out)
   d. When the specified number of session minutes has expired
      i. The current default specified for the time a lock can be held is 90 minutes.

4. An appropriate error message is displayed when a user attempts to modify a record that they no longer retain a lock on.
5. An appropriate error message is displayed when a user attempts to modify a record that is locked by another user.

NOTE: If an Invention Report's status is one of the Waive statuses, the Invention Report can no longer be modified. This does not mean that the Invention Report record is locked.

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7 Patent Report Information

iEdison has the following patent report functionality:

- Search for a Patent Report
- Create a Patent Report
- Modify a Patent Report
- Upload and View Patent Report Documents
- Grant View Only Access to a Patent Report
- Link a Patent Report to Parent Patent Report
- Create a Patent Report hierarchy

7.1 Create a New Patent Report

To create a new patent report:

1. Select **Main Menu** tab.
2. Click the **Create a Patent Report** hyperlink to access the *Invention Report Search* screen.
3. Search for the invention report you want to associate with the patent. For more information please refer to the Search for an Invention Report topic.
4. Click the **Add Patent Report** button for the appropriate Invention Report.

When the **Add Patent Report** button is clicked on the *Invention Report Search* screen, the system displays the *Create Patent Report* screen.

NOTE: The appropriate Patent number is required when a date is entered in any one of the Patent date fields.

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Interagency Edison

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Main Menu | Search Inventions | Search Patents | Search Utilization | Search Documents | Search iEdison Account | About | Help | Logout

Create Patent Record

View Invention/Patent Tree: Vertical Horizontal

Cancel Submit

Invention Report Number: 7654321-14-0006

Grantee/Contractor Organization: DAN'S INSTITUTION (7654321)

Patent Docket Number:

* Type of Patent Application: ORD/UTIL

* U.S. Patent Title: Harry's Test Record

Keyword(s): Enter Keyword Add

* Inventor(s): Enter First Name | Enter Middle Name | Enter Last Name Add

First Name	Middle Name	Last Name	Action
Harry		Houdini	[Delete] [Modify]

Provisional Patent Application Number: (60 or 61 or 62/###,###)

Filing Date of Provisional Patent Application (required if Provisional Application number supplied): (mm/dd/yyyy - cannot be before June 8, 1995)

Non-Provisional Patent Application Number: (06 or 07 or 08 or 09 or 10 or 11 or 12 or 13 or 14 or 90/###,###)

Filing Date of Non-Provisional Patent Application (required if Non-Provisional Application number supplied): (mm/dd/yyyy)

PCT Patent Application Number: (PCT/AAYYYY/######)

Filing Date of PCT Patent Application (required if PCT number supplied): (mm/dd/yyyy)

Patent Number: Help with Formats

Patent Issue Date (required if Patent number supplied): (mm/dd/yyyy)

Patent Expiration Date: (mm/dd/yyyy)

Explanatory Notes:
By: BINGAMANL
On: 2014-12-29
Test 1

Figure 87: Top Half of the Create New Patent Report Screen

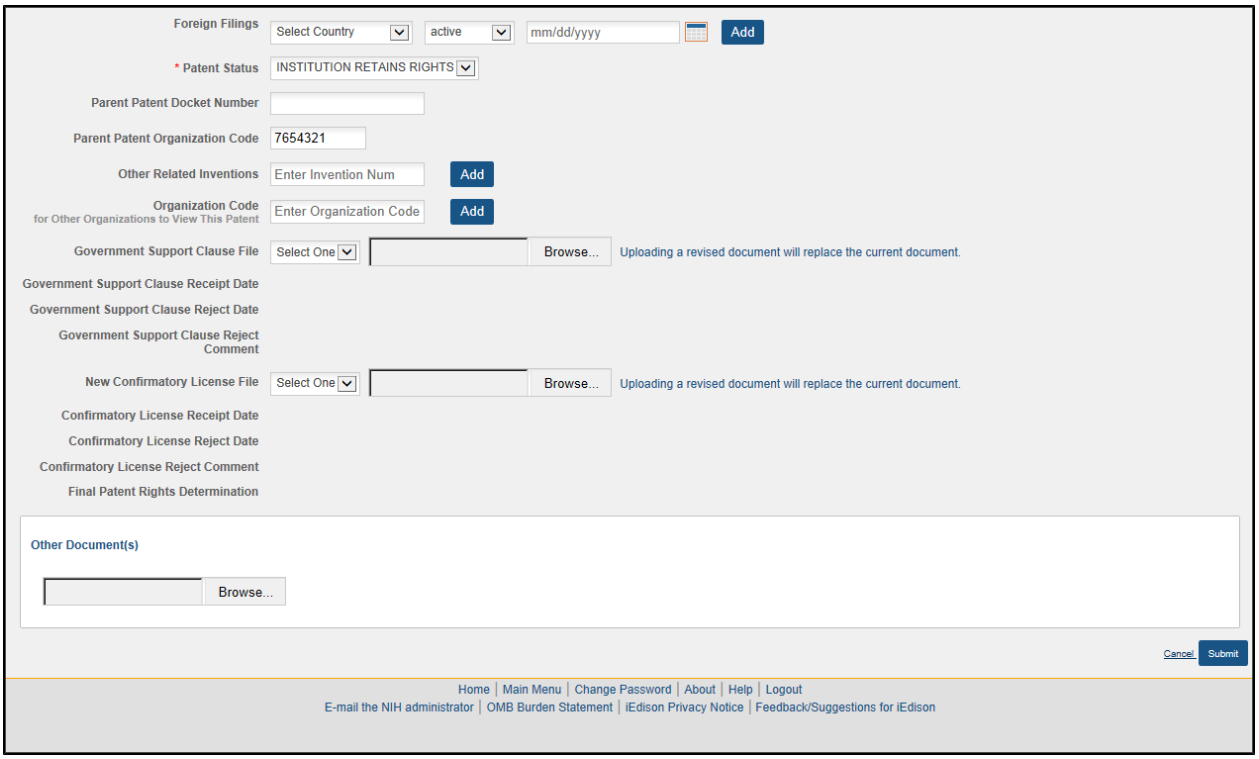

Figure 88: Bottom Half of the Create New Patent Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

NOTE: At least one of the filing dates must be added before saving the Patent Report record. You must *Elect Title* to the invention in the Invention Report for the **Non-Provisional Patent Application Number** or the **Filing Date of the Non-Provisional Patent Application** fields to be editable.

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5. Enter patent report information, noting the following:
    a. Fields with an asterisk (*) are required.
    b. To add additional keywords click the Add/Edit Keywords button. For more information please refer to the Add/Modify Keywords for a Patent Report topic.
    c. To add additional inventors click the Add/Edit Inventors button. For more information please refer to the Add/Modify Inventors for a Patent Report topic.
    d. To add additional foreign filings, click the **Add/Edit Foreign Filings** button. For more information please refer to the Add/Modify Foreign Filings for a Patent Report topic.
    e. Government Support Clauses and Confirmatory Licenses should be added.
        i. Submit the Patent Report first. Then add the document.
        ii. For more information please refer to the Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License Document topic.

f. Government Support Clauses and Confirmatory Licenses can be viewed. For more information please refer to the View a Government Support Clause or Confirmatory License Document topic.

6. To view the vertical hierarchical structure of the linked patents relating to the invention, click the **Vertical** hyperlink at the top of the screen.

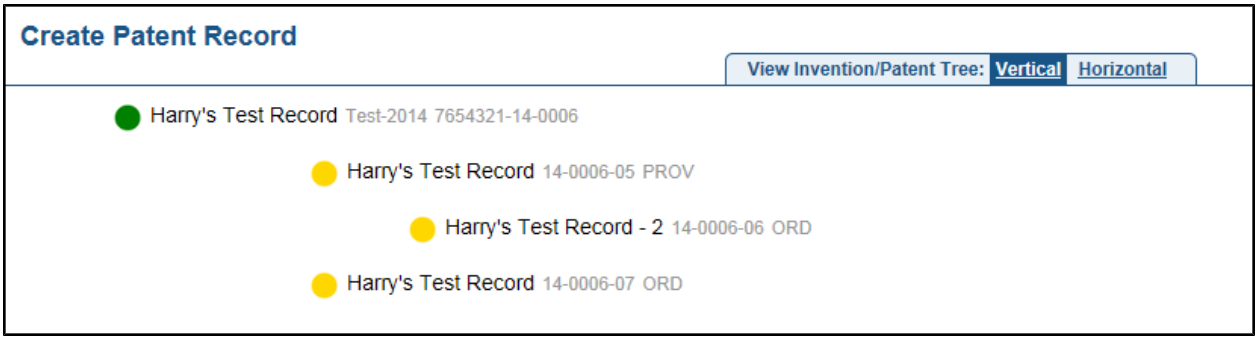

Figure 89: Create patent Record Displaying the Vertical Patent Report Structure

7. To view the horizontal hierarchical structure of the linked patents relating to the invention, click the **Horizontal** hyperlink at the top of the screen.

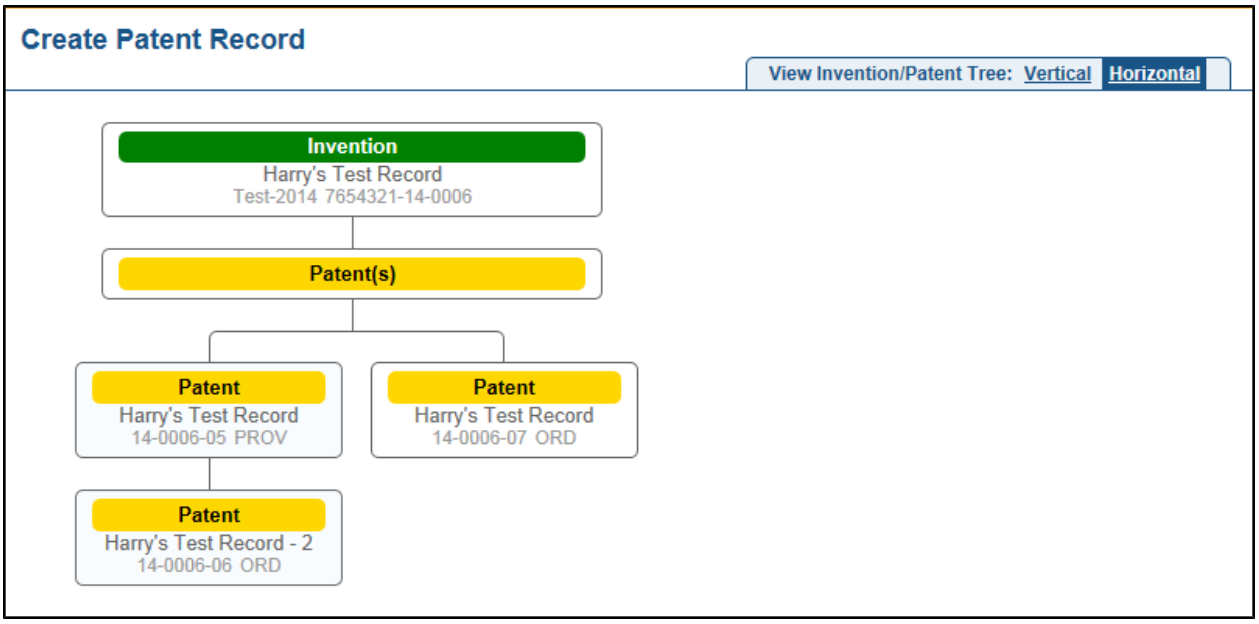

Figure 90: Create patent Record Displaying the Horizontal Patent Report Structure

8. When all information has been entered, click the **Submit** button to submit the information.

NOTE: If the **Submit** button is not clicked, the data entered is not saved in the system.

When the **Submit** button is clicked, the system displays a *Confirmation Needed*screen.

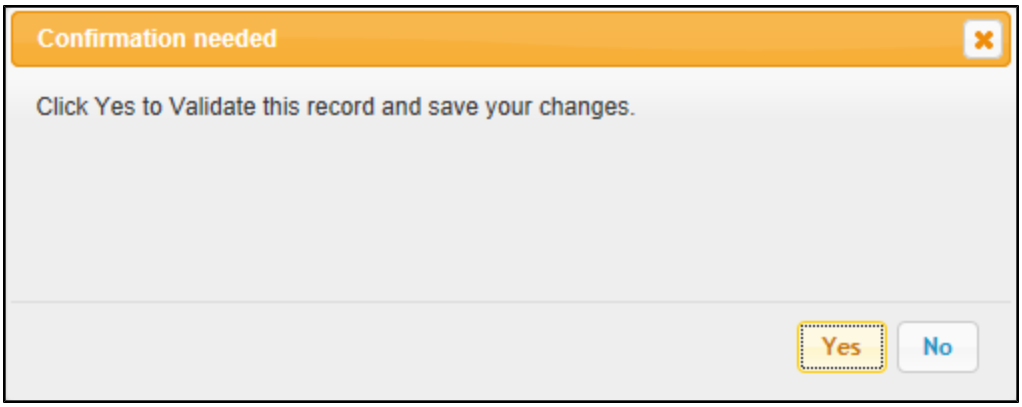

Figure 91: Patent Report Confirmation Needed Screen

8. Perform one of the following options on the *Confirmation Needed* screen.
    a. Click the **Yes** button to verify the Patent information.
    b. Click the **No** button to continue adding Patent information.

NOTE: For NSF Patent Report is a Patent Cooperation Treaty (PCT) type patent, the Confirmatory License (CL) and Government Support Clause (GSC) are not required to be provided.

The Patent Cooperation Treaty (PCT) year in the **PCT Patent Application Number** field should match the year in the **Filing Date of PCT Patent Application** field. If the years do not match, the system displays the following error message: *The PCT number supplied does not correspond with the PCT Filing Date indicated*.

When the PCT year is converted to 4 digit year, the following conditions are verified:

1. If the PCT filing date is 12/31/1999 or earlier, then the PCT Application Patent Number should contain a four-digit year that begins with 19.
2. If the PCT Filing date is 1/1/2000 or later, then the PCT Application Patent Number should contain a four-digit year that begins with 20.

If either of these validations occurs, then the following error message is displayed: *If the PCT filing date is 12/31/1999 or earlier, the PCT Application Number should contain a four-digit year that begins with '19'. If the PCT Filing date is 1/1/2000 or later, the PCT Application number should contain a four-digit year that begins with '20'.*

If there are no errors and the **Yes** button is clicked, the *View Patent Record* screen is displayed confirming the patent report was saved to the database and allowing you to add another or modify the newly created patent report.

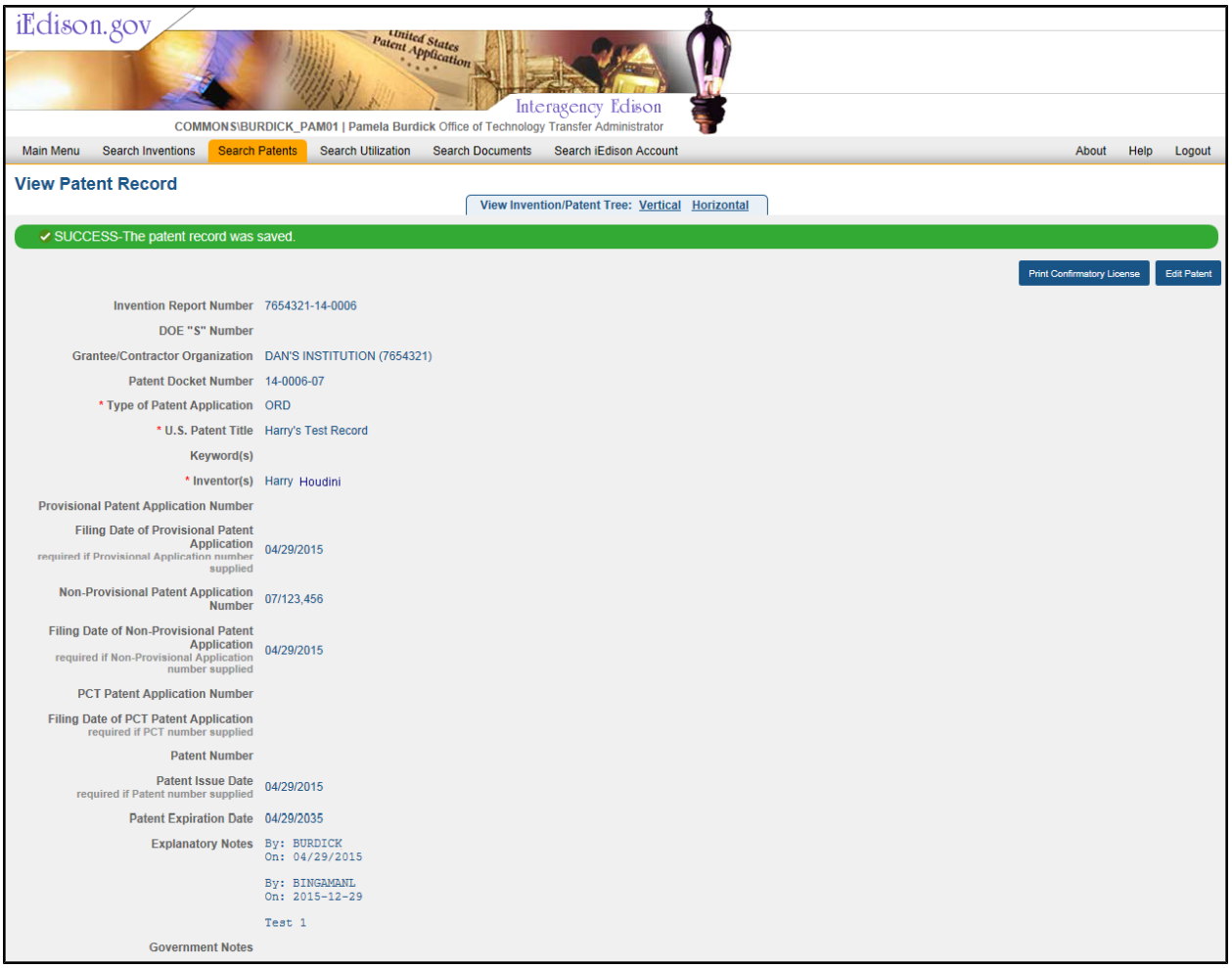

Figure 92: View Patent Record Confirmation Screen - Top Half

Figure 93: View Patent Record Confirmation Screen - Bottom Half

9. To print the license, click the **Print Confirmatory License** button.
10. To edit the Patent Report, click the **Edit Patent** button.

7.1.1 Patent Number Formats

The following approved patent number formats can be used in the iEdison system.

Symbol or Character Description	Examples:
# - Any digit ' ' - A literal string; the quote marks themselves should be omitted	
####### ######## 'PLT'#### 'PLT'##### 'PP'#### 'PP'##### #,###,### ##,###,###	1234567 12345678 PLT1234 PLT12345 PP1234 PP12345 1,234,567 12,345,678

Table 3: Patent Number Format Legend

Symbol or Character Description	Examples:
'D'##### 'PP'#,### 'PP'##,### 'RE'##### 'PV'####### 'PV'#########	D12345 PP1,234 PP12,345 RE12345 PV1234567 PV123456789

Table 3: Patent Number Format Legend

7.1.2 Search for a Patent Report

The search fields on the *Patent Report Search - Search for iEdison Patent Report* screen are all optional. Use any desired combination of the fields to perform the patent report search.

To search for a patent report:

1. Perform one of the following options to access the *Patent Search - Search for Patent Reports* screen:
    a. Select **Main Menu** tab
        i. Click the **Search/Modify Existing Patent Reports** hyperlink.
    b. Click on the **Search Patents**tab at the top of the screen.

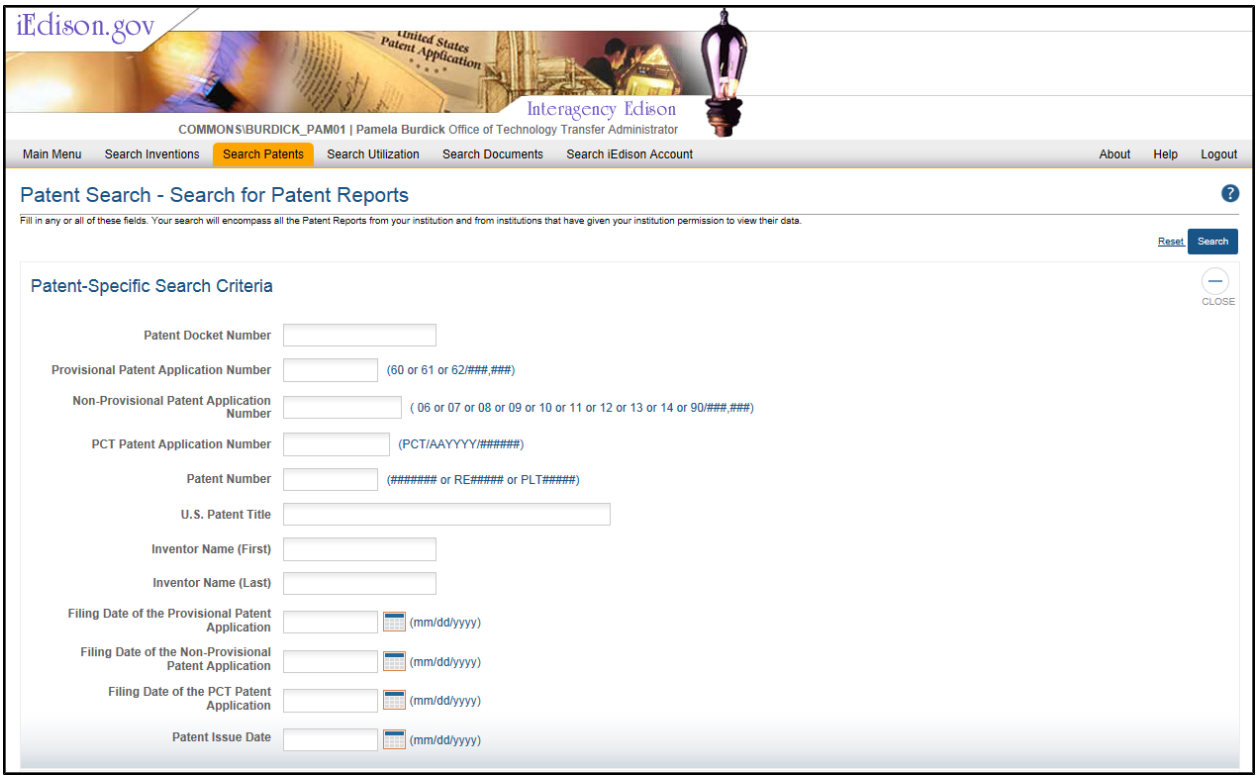

Figure 94: Top Half of the Patent Report Search Screen

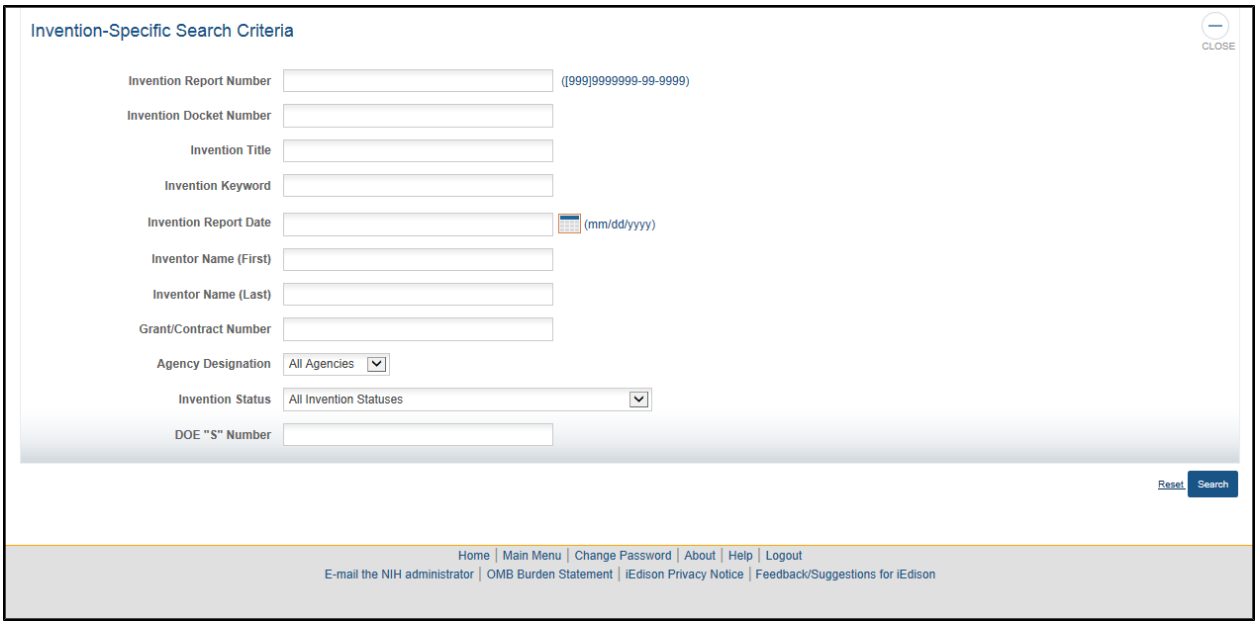

Figure 95: Bottom Half of the Patent Report Search Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

3. Enter the desired search information, noting the following:
    a. Your search results encompasses all the patent reports from your organization and from grantee and contractor organizations that have given your organization access to view their invention reports.
    b. The search criteria include patent-specific as well as invention report-specific parameters. Any combination of these fields can be used to perform the patent report search.
4. To expand or collapse patent and/or invention search criteria, click the **+ View** or the **- Close** buttons respectively.
5. Perform one of the following options:
    a. Click the **Search** button to enter the search and open the *Patent Report Search Results* screen.
    b. Click the **Reset** button to clear out the search criteria.

When the **Reset** button is clicked, the system displays the *Confirmation Needed* screen with the following message: *Are you sure you want to reset all changes made on this page and revert to the initial values?*

Figure 96: Reset Search Criteria Confirmation Needed Screen

6. Perform one of the following options on the *Confirmation Needed* screen.
    a. Click the **Yes** button to verify the Patent information.
    b. Click the **No** button to continue adding Patent information.

When the **Search** button is clicked, the system displays a list of matching patent reports on the *Patent Search - Search for Patent Reports* screen.

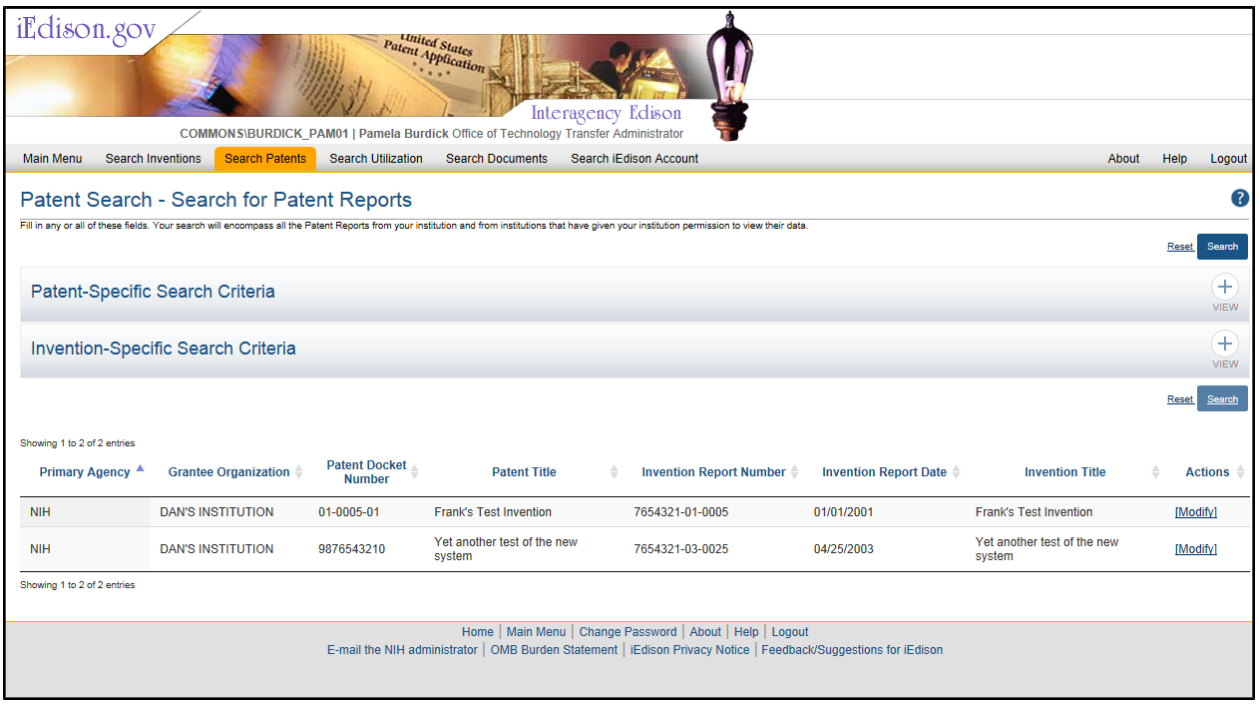

Figure 97: Patent Search - Search for Patent Reports Screen

NOTE: Results are sorted alphabetically by **Patent Docket Number** in ascending order.

7. To sort the search results, click the up (descending order) or down (ascending order) arrows next to the headings in the hit list.
8. To move forward or backwards in the search results, click the **Page Number**, **Prev**, and/or **Next** hyperlinks.

Figure 98: Navigation Feature on the Patent Report Search Results Screen

9. In the hit list click the **Modify** hyperlink for the appropriate Patent Report to view or make modifications to the selected patent report.

When the **Modify** hyperlink is clicked, the *Modify Patent Record* screen is displayed. For more information, please refer to the View/Modify a Patent Report topic.

7.1.3 View/Modify a Patent Report

A Patent Report cannot be modified if it is in one of the following waived statuses:

- *Waive to Government*
- *Assign to Inventor*
- *Assign to Third Party*

A Patent Report **cannot** be waived on an NIH Extramural Inventions Report (EIR) if the following conditions exist:

- A missing or rejected Government Support Clause (GSC)
- A missing or rejected Confirmatory License (CL)
- GSC or CL waiting to be approved

To modify a patent report,

1. Search for and select the patent report as described in Search for a Patent Report topic.

The *Modify Patent Report* screen is displayed.

NOTE: The appropriate Patent number is required when a date is entered in any one of the Patent date fields.

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Main Menu | Search Inventions | Search Patents | Search Utilization | Search Documents | Search iEdison Account | About | Help | Logout

Modify Patent Record

View Invention/Patent Tree: Vertical Horizontal

Cancel Submit

Invention Report Number: 7654321-14-0006

Grantee/Contractor Organization: DAN'S INSTITUTION (7654321)

Patent Docket Number: 14-0006-07

* Type of Patent Application: ORD/UTIL

* U.S. Patent Title: Harry's Test Record

Keyword(s): Enter Keyword Add

* Inventor(s): Enter First Name | Enter Middle Name | Enter Last Name Add

First Name	Middle Name	Last Name	Action
Harry		Houdini	[Delete] [Modify]

Provisional Patent Application Number: (60 or 61 or 62/###,###)

Filing Date of Provisional Patent Application (required if Provisional Application number supplied): 04/29/2015 (mm/dd/yyyy - cannot be before June 8, 1995)

Non-Provisional Patent Application Number: 07/123,456 (06 or 07 or 08 or 09 or 10 or 11 or 12 or 13 or 14 or 90/###,###)

Filing Date of Non-Provisional Patent Application (required if Non-Provisional Application number supplied): 04/29/2015 (mm/dd/yyyy)

PCT Patent Application Number: (PCT/AAYYYY/######)

Filing Date of PCT Patent Application (required if PCT number supplied): (mm/dd/yyyy)

Patent Number: Help with Formats

Patent Issue Date (required if Patent number supplied): 04/29/2015 (mm/dd/yyyy)

Patent Expiration Date: 04/29/2035 (mm/dd/yyyy)

Explanatory Notes:

```
On: 04/29/2015

By: BINGAMANL
On: 2015-12-29

Test 1
```

Figure 99: Top Half of the Modify Patent Report Screen

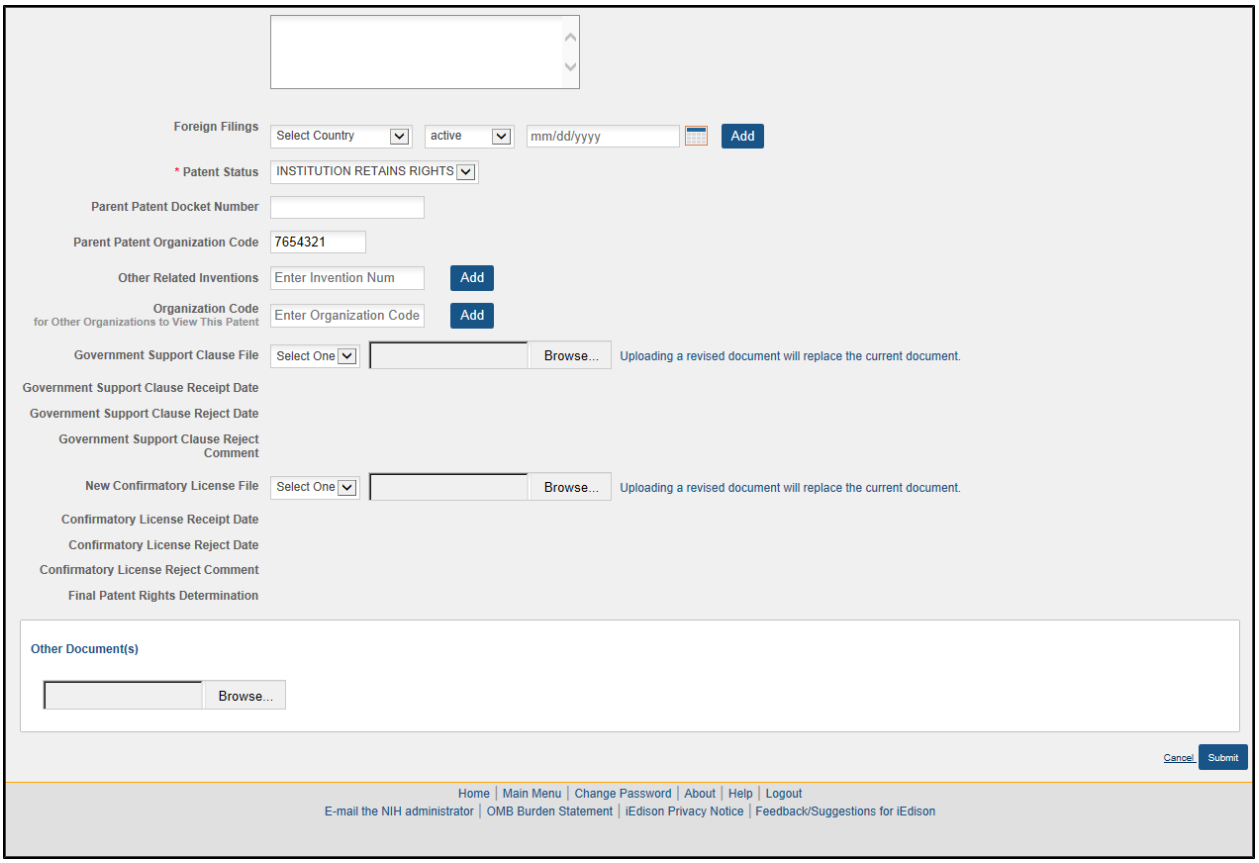


Figure 100: Bottom Half of the Modify Patent Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

2. Enter patent report information, noting the following:
    a. Fields with an asterisk (*) are required.
    b. To add additional keywords click the Add/Edit Keywords button. For more information please refer to the Add/Edit Keywords for a Patent Report topic.
    c. To add additional inventors click the Add/Edit Inventors button. For more information please refer to the Add/Modify Inventors for a Patent Report topic.
    d. To add additional foreign filings, click the **Add/Edit Foreign Filings** button. For more information please refer to the Add/Modify Foreign Filings for a Patent Report topic.
    e. Government Support Clauses and Confirmatory Licenses should can be added.
        i. Submit the Patent Report first. Then add the document.
        ii. For more information please refer to the Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License Document topic.
    f. Government Support Clauses and Confirmatory Licenses can be viewed. For more information please refer to the View a Government Support Clause or Confirmatory License Document topic.

3. To view the vertical hierarchical structure of the linked patents relating to the invention, click the **Vertical** hyperlink at the top of the screen.

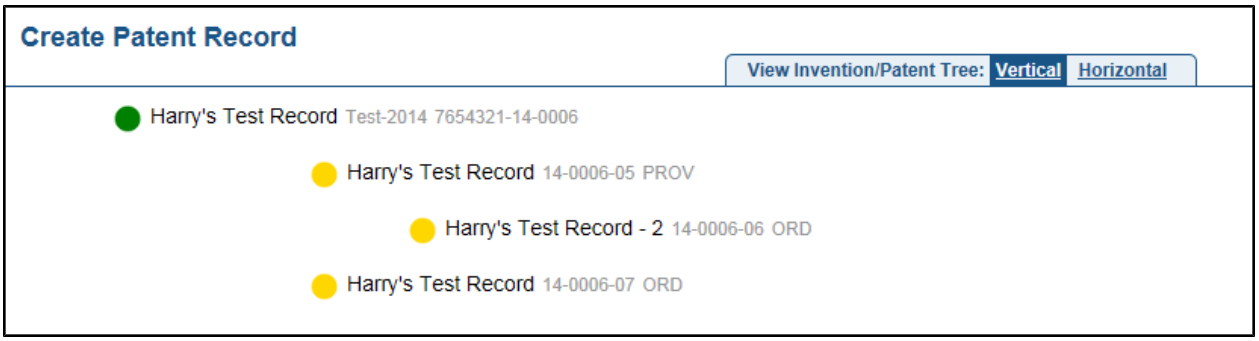


Figure 101: Create patent Record Displaying the Vertical Patent Report Structure

4. To view the horizontal hierarchical structure of the linked patents relating to the invention, click the **Horizontal** hyperlink at the top of the screen.

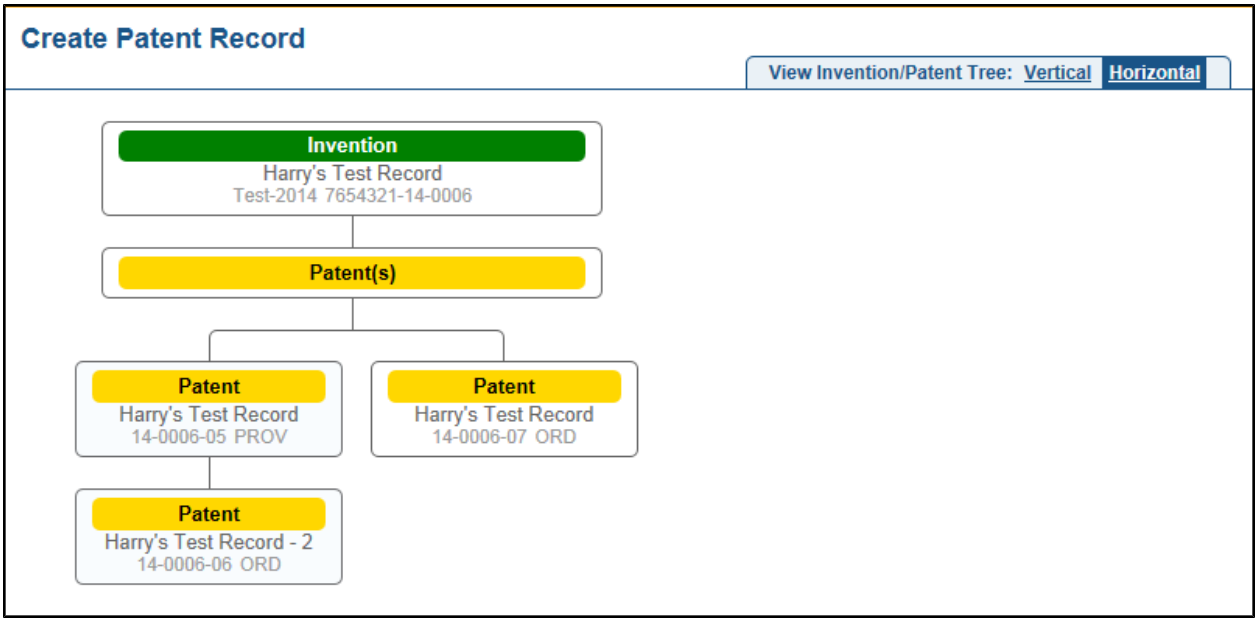


Figure 102: Create patent Record Displaying the Horizontal Patent Report Structure

5. When all information has been entered, click the **Submit** button to save the information.

NOTE: If the **Submit** button is not clicked, the data entered is not saved in the system.

If attempting to waive a Patent Report with a missing or rejected Government Support Clause and/or a Confirmatory License, the following error message(s) display accordingly when the **Submit** button is clicked:

1. If Extramural Notifications Exist: *The following notifications must be cleared before this Patent may be Waived: <EXTRAMURAL NOTIFICATION NUMBER>. Also, any messages suppressed by the institution also require resolution*.
2. If Agency Notifications Exist: *The following notification messages must be cleared by the Agency before this Patent may be Waived <AGENCY NOTIFICATION NUMBER>*.
3. *This patent record may not be waived until the Government Support clause is added to the Patent and attached to the patent record and accepted by the Government*.
4. *This patent record may not be waived until it is covered by a Confirmatory License citing the Federal Funding Agreement(s) under which it was made that is accepted by the Government*.

When the **Submit** button is clicked, the system displays a *Confirmation Needed*screen.

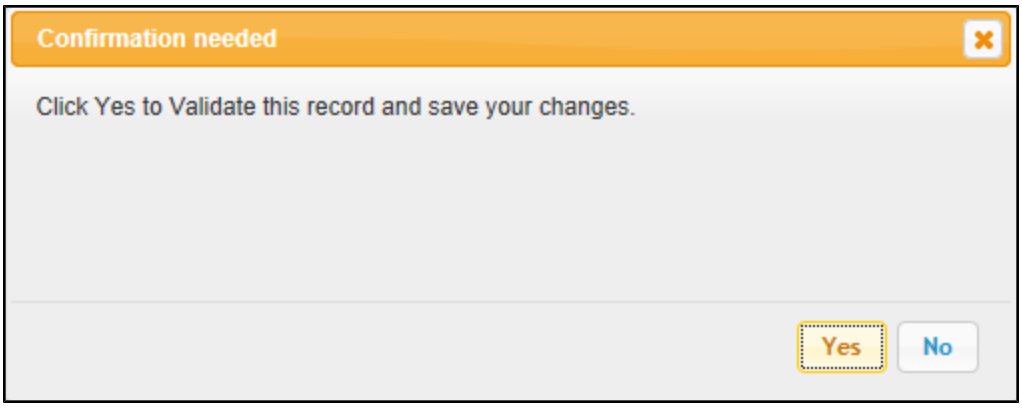


Figure 103: Patent Report Confirmation Needed Screen

6. Perform one of the following options on the *Confirmation Needed* screen.
   a. Click the **Yes** button to verify the Patent information.
   b. Click the **No** button to continue adding Patent information.

If there are no errors and the **Yes** button is clicked, the *View Patent Record* screen is displayed confirming the patent report was saved to the database and allowing you to add another or modify the newly created patent report.

iEdison.gov

Interagency Edison

COMMONS\BURDICK_PAM01 | Pamela Burdick Office of Technology Transfer Administrator

Main Menu | Search Inventions | Search Patents | Search Utilization | Search Documents | Search iEdison Account | About | Help | Logout

View Patent Record

View Invention/Patent Tree: Vertical Horizontal

✔ SUCCESS-The patent record was saved.

Print Confirmatory License | Edit Patent

Invention Report Number	7654321-14-0006
DOE "S" Number	
Grantee/Contractor Organization	DAN'S INSTITUTION (7654321)
Patent Docket Number	14-0006-07
* Type of Patent Application	ORD
* U.S. Patent Title	Harry's Test Record
Keyword(s)	
* Inventor(s)	Harry Houdini
Provisional Patent Application Number	
Filing Date of Provisional Patent Application required if Provisional Application number supplied	04/29/2015
Non-Provisional Patent Application Number	07/123,456
Filing Date of Non-Provisional Patent Application required if Non-Provisional Application number supplied	04/29/2015
PCT Patent Application Number	
Filing Date of PCT Patent Application required if PCT number supplied	
Patent Number	
Patent Issue Date required if Patent number supplied	04/29/2015
Patent Expiration Date	04/29/2035
Explanatory Notes	By: BURDICK On: 04/29/2015 By: BINGAMANL On: 2015-12-29 Test 1
Government Notes	
Foreign Filings	
* Patent Status	INSTITUTION RETAINS RIGHTS
Parent Patent Docket Number	
Parent Patent Organization Code	7654321
Other Related Inventions	
Organization Code for Other Organizations to View This Patent	
Current Government Support Clause	
Government Support Clause Receipt Date	
Government Support Clause Reject Date	
Government Support Clause Reject Comment	
Current Confirmatory License	
Confirmatory License Receipt Date	
Confirmatory License Reject Date	
Confirmatory License Reject Comment	
Final Patent Rights Determination	
Final Patent Rights Determination Date	
Domestic Waiver Decision	No
Domestic Waiver Decision Date	

Other Document(s)

Document Name	File	File Type	Document Category	Created By	Last Updated By

Print Confirmatory License | Edit Patent

Home | Main Menu | Change Password | About | Help | Logout

E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice | Feedback/Suggestions for iEdison

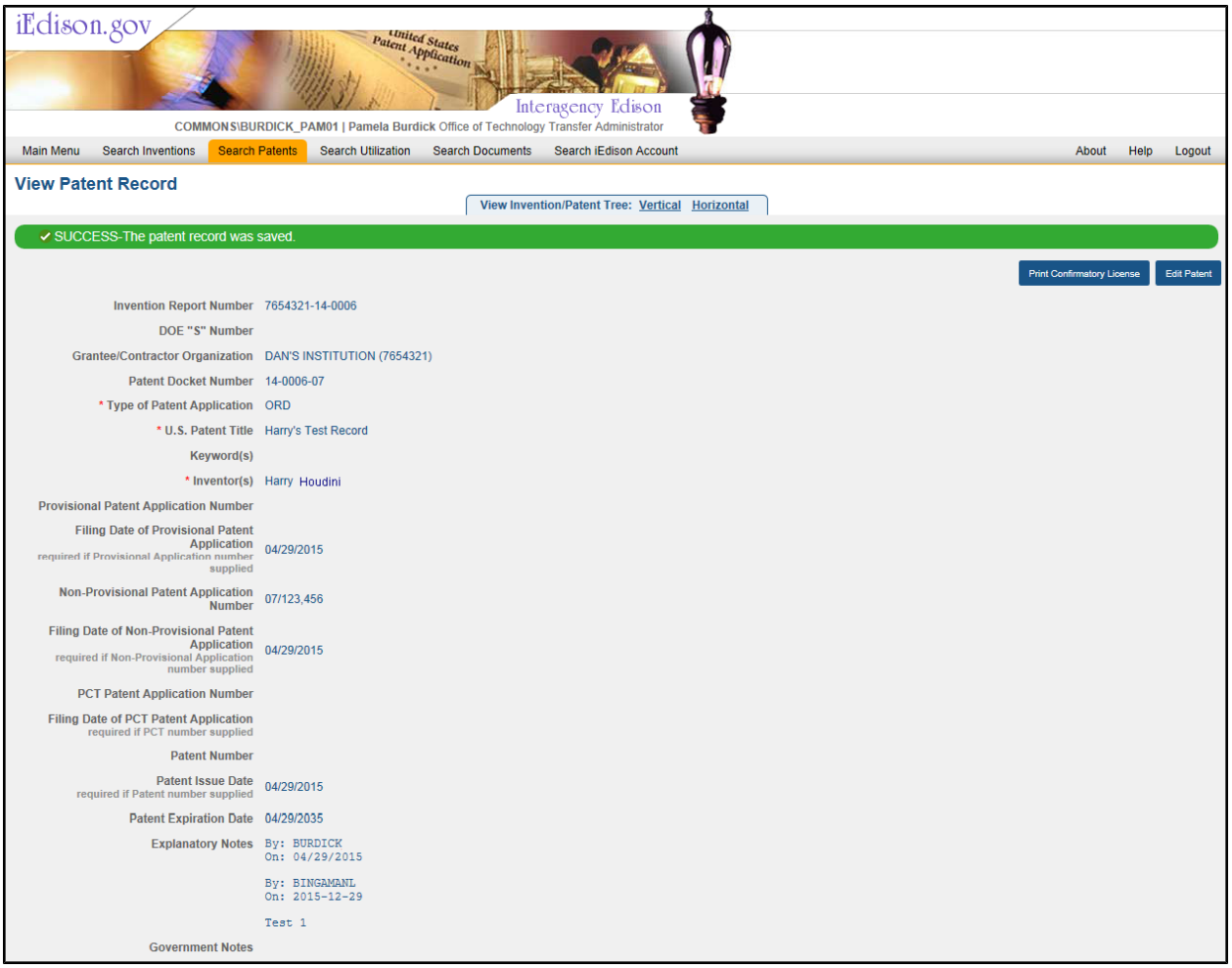


Figure 104: View Patent Record Confirmation Screen - Top Half

Figure 105: View Patent Record Confirmation Screen - Bottom Half

7. To print the license, click the **Print Confirmatory License** button.
8. To edit the Patent Report, click the **Edit Patent** button.

7.1.4 Add/Modify Foreign Filings for a Patent Report

The iEdison system allows up to 12 foreign filings to be associated with a patent report. The main screen allows entry of the first foreign filing. Additional foreign filings can be added using the **Add/Edit Foreign Filings** button.

To add or modify foreign filings for a patent report:

1. Add/modify a patent report as described in the Add a new Patent Report topic and/or the View/Modify a Patent Report topic.
2. Prior to submitting your changes:
   a. Enter the country, patent prosecutions status, and foreign filing action date for the first foreign filing on the *Create New Patent Report* screen or the *Modify Patent Report* screen, depending on whether you are adding or modifying.
3. If you need to add/modify additional foreign filings, select the appropriate country, patent prosecutions status, and date and click the **Add** button.

Foreign Filings | Select Country | mm/dd/yyyy | Add

Country	Patent Prosecution Status	Foreign Filing Action Date	Action
UNITED STATES	active	04/29/2015	[Delete] [Modify]
UNITED KINGDOM	active	04/29/2015	[Delete] [Modify]

Figure 106: Foreign Filings Section on the Create or Modify Patent Record Screens

NOTE: The foreign filing you entered first on the create or modify screen is listed first.

7.1.5 Add/Modify Inventors for a Patent Report

The iEdison system allows up to 4 inventors to be associated with a patent report. Inventor details can be added using the **Add** button on the *Create New Patent Report* screen or the *Modify Patent Report* screen. These screens allow entering the first inventor.

To add or modify inventors for an invention report:

1. On the *Create Patent Record* or *Modify Patent Record* screen, enter the first inventor in the **Inventor** field on the create screen and click the **Add** button.
2. If you need to add/modify additional inventors, enter the inventor's name and click the **Add** button.

NOTE: First and last name are required.

* Inventor(s) | Enter First Name | Enter Middle Name | Enter Last Name | Add

First Name	Middle Name	Last Name	Action
Frank		Yannett	[Delete] [Modify]
Dusty		Rhoades	[Delete] [Modify]

Figure 107: Add/Edit Inventors Section on the Create or Modify Patent Record Screens

NOTE: The inventor entered first on the create or modify screen is listed first.

7.1.6 Add/Modify Key Words for a Patent Report

The iEdison System allows up to 12 keywords to be associated with a patent report. The *Create Patent Record* screen or the *Modify Patent Record* screen allows entry of the first keyword.

Additional keywords may be added using the **Add** button.

1. On the *Create Patent Record* or the *Modify Patent Record* screen, enter the first keyword in the **Invention Keyword(s)** field.
2. If you need to add/modify additional keywords, type in the key word and click **Add** button.

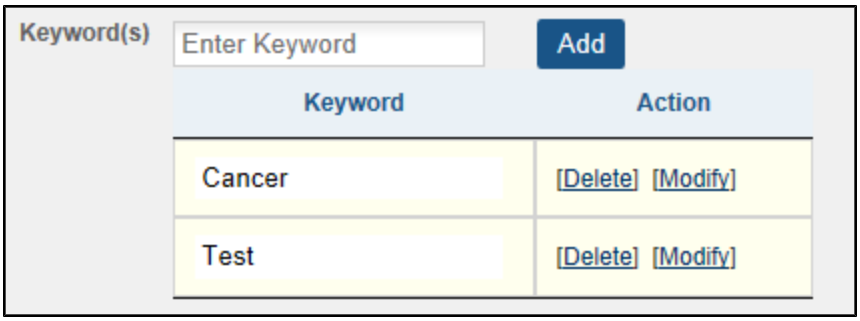


Figure 108: Add/Edit Keywords Section on Create or View Patent Record Screens

3. Enter the name for each additional keyword and click the **Add** button.

NOTE: The key word entered first on the create or modify screen is listed first.

7.1.7 Generate and Submit a Confirmatory License

7.1.7.1 Generate Confirmatory License from a Public Area

A version of the confirmatory license can be generated either from the public area of the iEdison site (requiring no log in) or after log in from the secure area of the iEdison site. If the license is generated after log in from the secure area, the iEdison system will automatically fill in the form with the information from the selected patent report.

To generate the confirmatory license from the public area:

1. From the *Welcome to iEdison* screen, select *NIH* from the agency acronyms listed on the *Home* screen to access the *NIH Extramural Invention Topics* screen.
2. Select the **License to the U. S. Government** hyperlink to access the *License to United States Government* screen.

iEdison.gov About Help

License to United States Government

All fields marked with an asterisk (*) are required. Fill out the fields below then choose "Submit" to generate a printable version of the License to the United States Government form. Print the document using your browser's "print" function. The printed license can be completed by signing and submitting the executed document to the appropriate funding agency (e.g. upload in iEdison).

License Form

Invention Title	
Inventor(s)	
Patent or Application Serial No.	#,###,### or ##/###,###
U.S. Filing/Issue Date	
Grant/Contract Number(s)	
Foreign Applications filed/intended in (countries)	
Grantee/Contractor Organization	
Business Address	

Submit Cancel

Home | About | Help IEDISON-1015
E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice

Figure 109: License to United States Government Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

NOTE: Each license should only have one patent or one application listed.

The Confirmatory License Form's **Patent or Application Serial No.** and the **U.S. Filing/Issue Date** fields is generated based on the earliest U.S. patent information provided in the Patent Report. iEdison looks at Provisional, Non-Provisional, Patent Issued, and Patent Cooperation Treaty (PCT) numbers and filing dates, if provided, and populate the Confirmatory License Form's **Patent or Application Serial No.** and the **U.S. Filing/Issue Date** fields accordingly.

3. Enter the confirmatory license information.
4. Perform one of the following options:
    a. Click the **Submit** button to submit the information.
    b. Click the **Cancel** button to exit the screen.

A printable version of the confirmatory license is displayed with the information you entered filled in.

License to the United States Government

Sign and submit the executed document to the appropriate funding agency (e.g. upload in iEdison).

Invention Title: Radioactive Protection Shield

Inventor(s): Madam Marie Curie

U.S. Filing/Issue Date: _____

Patent or Application Serial No.: _____

Grant/Contract Number(s): CNS9999999 , CNS9999999 , CNS9999999

Foreign Applications filed/intended in (countries): _____

The invention identified above is a Subject Invention under **35 U.S.C. 200, et seq.**, and the Standard Patent Rights clause at **37 CFR 401.14, FAR 52.227-11** or **FAR 52.227-12** (if applicable) which are included among the terms of the above identified grant or contract award from the United State Government. This document is confirmatory of:

1. The nonexclusive, nontransferable, irrevocable, paid-up license to practice or have practiced for or on behalf of the United States the invention described in any patent application and in any and all divisions, continuations, and continuations in part, and in any and all patents and re-issues granted thereon throughout the world; and
2. All other rights acquired by the Government by reason of the above identified grant/contract award and the laws and regulations that are applicable to the award.

The Government is hereby granted an irrevocable power to inspect and make copies of the above-identified patent application.

Signed this _____ day of _____, 20 _____.

By _____ _____
(Institutional Business Official) (Signature)

Title _____

For MADAM CURIE INSTITUTE OF PARIS RESEARCHERS
(Grantee/Contractor Organization)

At Madam Curie Institute Of Paris Researchers, 537 West Moulin Rouge Street, New York, New York 10910 UNITED STATES
(Business Address)

Figure 110: Example of Printable Version of the License to United States Government

5. Print, sign, and fax the form to NIH at 301-480-0272.

7.1.7.2 Generate Confirmatory License from a Secure Area

To generate the confirmatory license from the secure area:

1. Add/Modify a patent report as described in the Add a New Patent Report topic or in the View/Modify a Patent Report topic.
2. When the *Patent Report Confirmation* screen is displayed, select the **Print License** button.

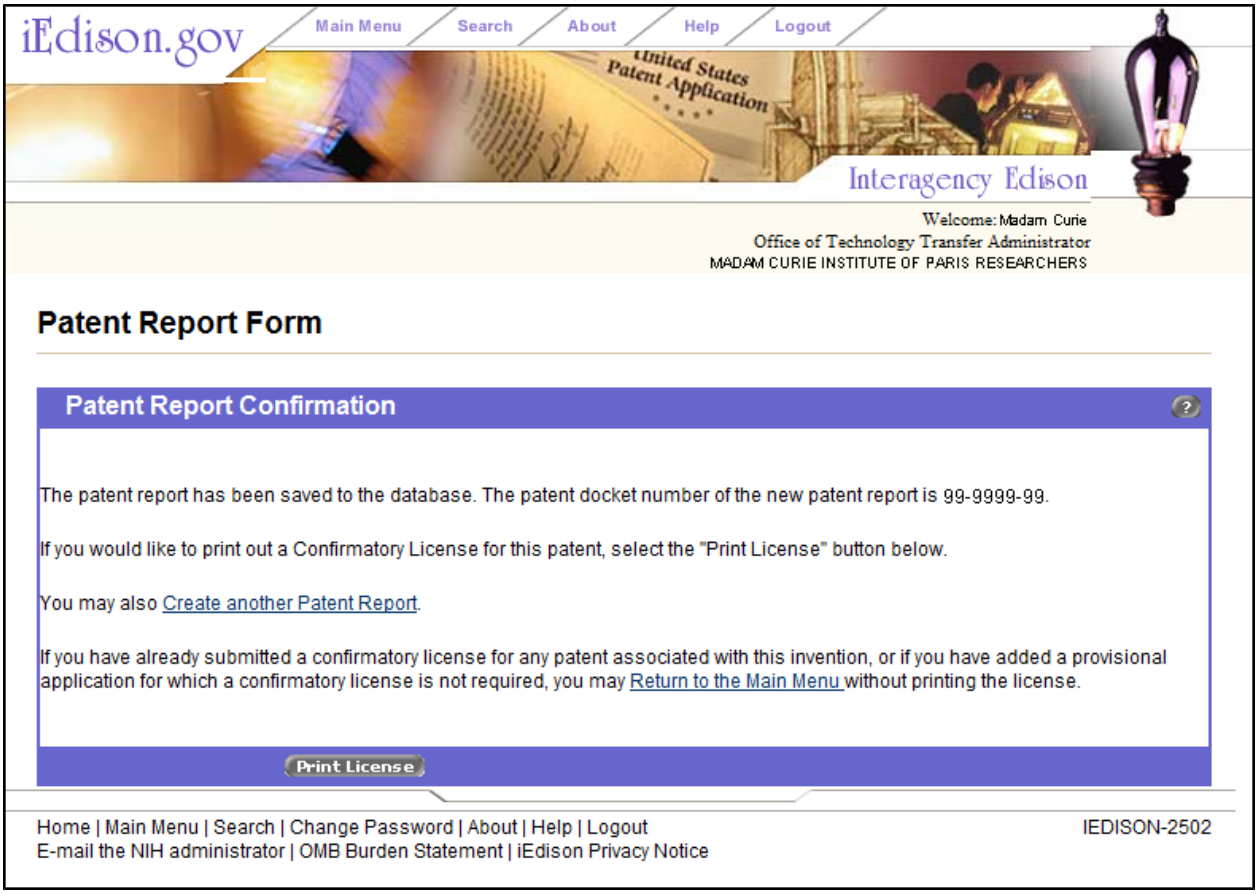


Figure 111: Create Patent Report Confirmation Screen

A printable version of the confirmatory license is displayed with information from the selected patent report filled in. Please refer to the previous printable version example.

3. Print, sign and fax the form to NIH at (301) 480-0272.

7.2 Uploading and Viewing Patent Report Documents

Users with the TTO Administrator and TTO User role can electronically submit and view the most recently uploaded government support clauses and confirmatory licenses in the iEdison system.

These documents can be submitted in three different formats:

- PDF – Portable Document Format
- TIFF - Tagged Image File Format

Please note the following items:

1. The **preferred method** is a PDF or TIFF document.
2. If no electronic PDF or TIFF documents are available and another electronic method is required by the funding agency, you may consider submitting ASCII text.

7.2.1 Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License

NOTE: It is recommended to create the Patent Report and save the report first before uploading the Government Support Clause and the Confirmatory License documents.

To submit an electronic version of these documents:

1. Add/modify a patent report as described in the Add a New Patent Report topic or the View/Modify a Patent Report topic.
2. Prior to submitting your changes:
   a. For PDF or TIFF Confirmatory License documents, select the appropriate document type, click the **Browse** button, and select the file or type the file location in the **Confirmatory License File Location** field.
   b. For PDF or TIFF Government Support Clause documents, select the appropriate document type, click the **Browse** button, and select the file or type the file location in the **Government Support Clause File Location** field.

NOTE: There is a maximum of 20 pages of text. Anything longer than 20 pages is truncated.

4. Click the **Submit** button to enter the information.

When the **Submit** button is clicked, the system displays a *Confirmation Needed*screen.

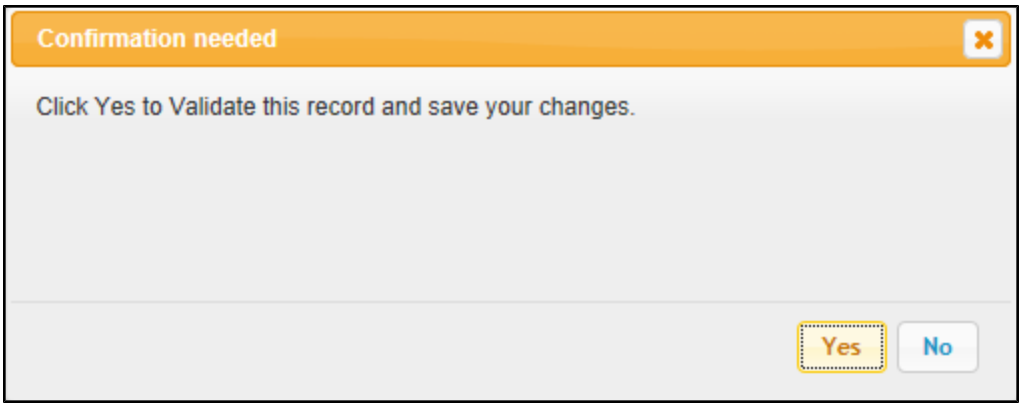


Figure 112: Patent Report Confirmation Needed Screen

5. Perform one of the following options on the *Confirmation Needed* screen.
    a. Click the **Yes** button to verify the Patent information.
    b. Click the **No** button to continue adding Patent information.

If there are no errors and the **Submit** button is clicked, the *View Patent Record* screen is displayed confirming the patent report document was saved to the database and allowing you to add another or modify the newly created patent report.

6. Perform one of the following options:
    a. Click the **Print Confirmatory License** button to print the license.
    b. Click the **Edit Patent** button to return to the previous screen and modify the patent report.

7.2.2 View a Current Government Support Clause or Current Confirmatory License Document

To view a current government support clause or current confirmatory license document:

1. Perform one of the following options:
    a. Search for and select the patent report as described in Search for a Patent Report topic.
    b. Add/modify a patent report as described in as described in Add a New Patent Report topic and View/Modify a Patent Report topic.
2. Before submitting your changes:
    a. Select the **View Current Document** hyperlink next to the **Current Confirmatory License** field to view the confirmatory license or **Current Government Support Clause** field to view the government support clause.

Figure 113: View Current Document Hyperlink Hyperlink

NOTE: For help viewing PDF or TIFF versions of the confirmatory license and government support clause documents, please refer to the Troubleshooting the Viewing of PDF/TIFF Government Support Clause and Confirmatory License Documents topic.

7.2.3 Generate Confirmatory License from within iEdison

A version of the confirmatory license can be generated from the public area of the iEdison site (requiring no login) or from the secure area of the iEdison site. If the license is generated from the secure area, the iEdison system automatically populates the form with the information from the selected patent report.

7.2.3.1 Public Area of the iEdison Site

To generate the confirmatory license from the public area:

1. From the Welcome to iEdison page, select *NIH* to access the *NIH Extramural Invention Topics* screen.

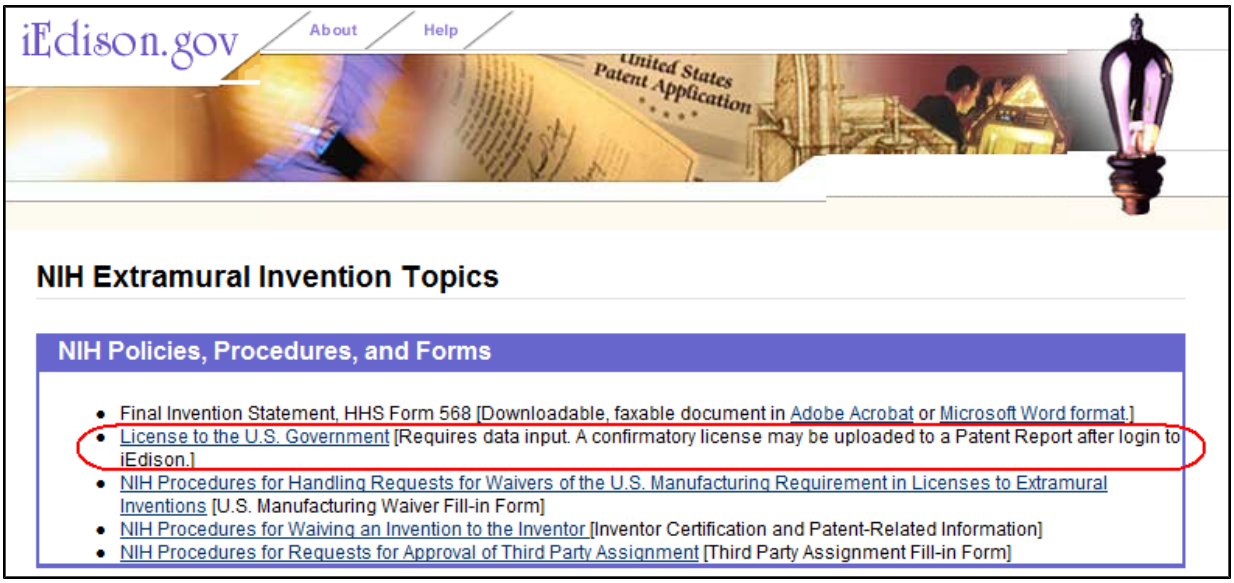


Figure 114: NIH Extramural Invention Topics Screen

2. Select License to the U. S. Government to access the License to United States Government - License Form page.

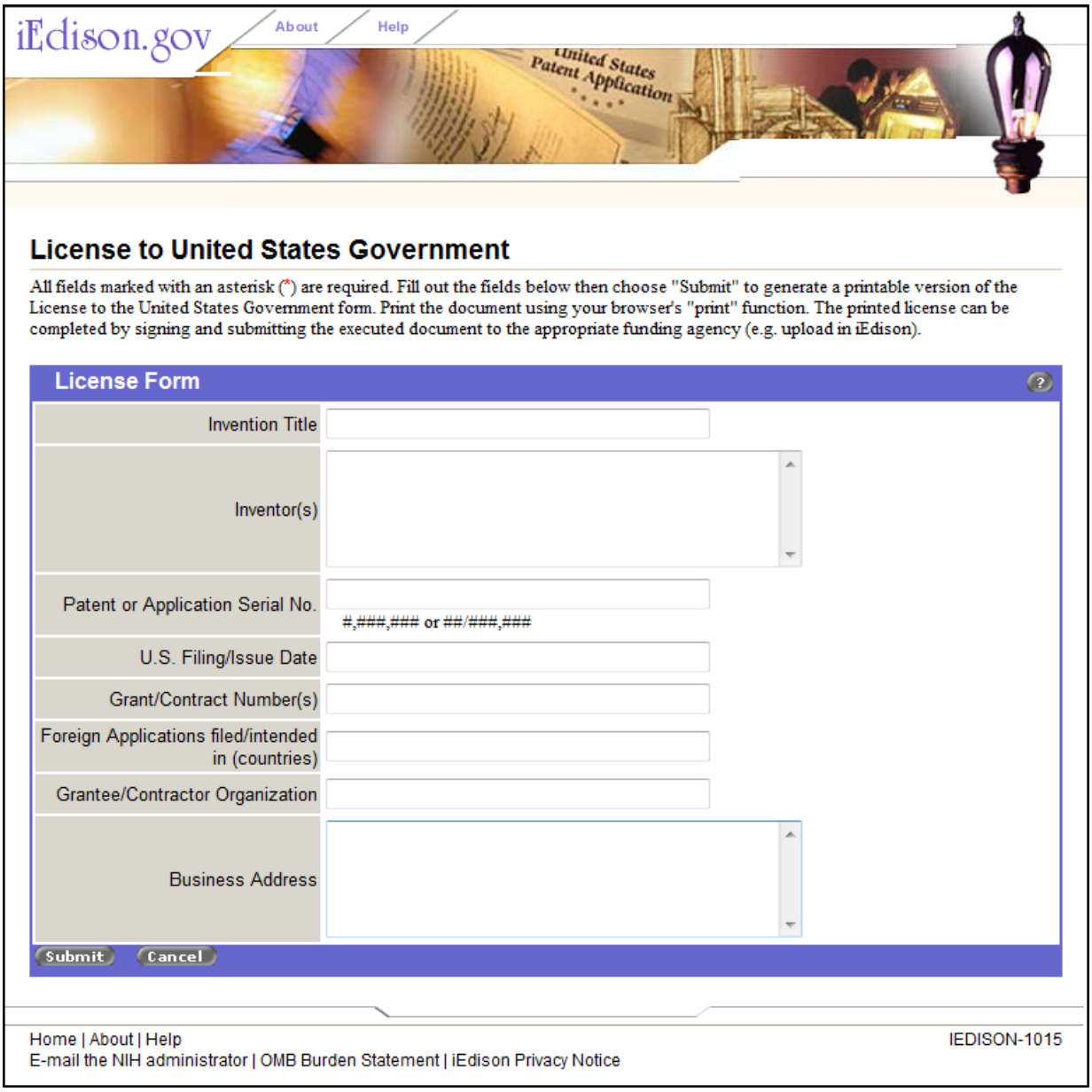


Figure 115: License to United States Government Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

3. Enter the confirmatory license information.
4. Click the **Submit** button.

NOTE: A printable version of the confirmatory license is displayed with the information you entered filled in.

5. Print, sign and fax the form to the NIH at 301-480-0272.

7.2.3.2 Confirmatory License from Secure Area

To generate the confirmatory license from the secure area:

1. Add/modify a patent report as described in the Add a New Patent Report topic or the View/Modify a Patent Report topic.
2. When the create or modify confirmation screen is displayed, select the Print License button.

NOTE: A printable version of the confirmatory license is displayed with information from the selected patent report filled in.

3. Print, sign and fax the form to the NIH at 301-480-0272.

7.2.4 Troubleshooting the Viewing of PDF/TIFF Government Support Clause or Confirmatory License Documents

7.2.4.1 To troubleshoot viewing of PDF documents:

1. Verify a version of Adobe Reader is installed on your computer. Downloads of Adobe Reader can be found at http://www.adobe.com/support/downloads/main.html#Readers.
2. Click the **Start --> Run** from the Windows menu bar.
3. Type *regedit* in the field provided.
4. Click the **OK** button.

The *Registry Editor* window opens.

5. In the *Registry Editor* window, navigate to **My Computer --> HKEY_CLASSES_ROOT --> MIME --> Database --> Content Type --> application/pdf**.
6. Verify that .pdf is listed as the value next to the Extension.
   a. If not, click on the **Extension** button and then click **Edit --> Modify** using the edit menu bar.
   b. Enter .pdf in the value data field and click the **OK** button.

NOTE: If you continue to have problems viewing PDF government support clause or confirmatory license documents contact technical support at your organization.

7.2.4.2 To troubleshoot viewing of TIFF documents:

1. Verify a version of QuickTime is installed on your computer. Downloads of QuickTime can be found at http://www.apple.com/quicktime/download/.
2. Click **Start --> Settings --> Control Panel** from the Windows menu bar.
3. Double click on the **QuickTime** icon to open the *QuickTime Settings* window.
4. Select Browser Plug-In from the drop down field at the top of the window.
5. Click the **MIME Settings** button.
6. Click the plus sign (+) next to the **Images Header** to open the *Images* directory.
7. Check the box next to the **TIFF image file** field.
8. Click the **OK** button.

NOTE: If you continue to have problems viewing TIFF government support clause or confirmatory license documents contact technical support at your organization.

7.3 Patent Report Properties

The iEdison system allows you to:

- Grant View Only Access of a Patent Report to another Organization
- Link a Patent Report to Other Patent Reports within the same Invention Report

7.3.1 Grant View Only Access to a Patent Report

The iEdison system allows you to grant view only access to a patent report to other organizations.

1. To grant view only access, on the *Create Patent Record* screen or the *Modify Patent Record* screen, enter the organization codes you are granting access to in the **Organization Code for Other Organizations to View this Patent** field and click the **Add** button.

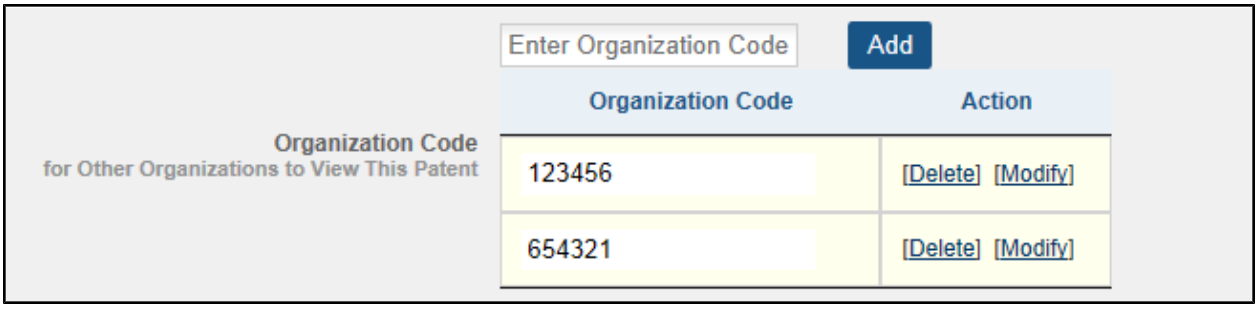


Figure 116: Organization Code for Other Organizations to View This Patent Field

Only the organization that submitted the parent invention report has permission to edit the linked patent reports.

NOTE: You can grant access to a maximum of three other organizations.

7.3.2 Link a Patent Report

Patent reports can be linked in the iEdison system to other patents. Once patent reports are linked, the patent appears in the **View Invention/Patent Tree** on the *Create Patent Record* or *Modify Patent Record* screens.

To link patents:

1. Search for and select the parent patent report as described in the Search for a Patent Report topic.
2. Write down the value of the **Grantee/Contractor Organization** and **Patent Docket Number** fields.

Figure 117: Modify Patent Record Screen Displaying Patent Report Form Fields

3. Search for and select the patent report that you would like to link to the parent patent report.
4. Enter and submit the **Patent Docket Number** and the **Grantee/Contractor Organization Code** field associated with the parent patent into the **Parent Patent Docket Number** field and the **Parent Patent Organization Code** field.

Figure 118: Modify Patent Record Screen Displaying Parent Patent Report Form Fields

The patent report is now linked to the parent patent identified by the patent docket number and patent organization code you entered. Vertical structure for the patent report now reflects the linked relationship between these patent reports.

NOTE: Complete step 4 above for each patent that you want to designate as a child to the parent patent. You can link a maximum of four patents.

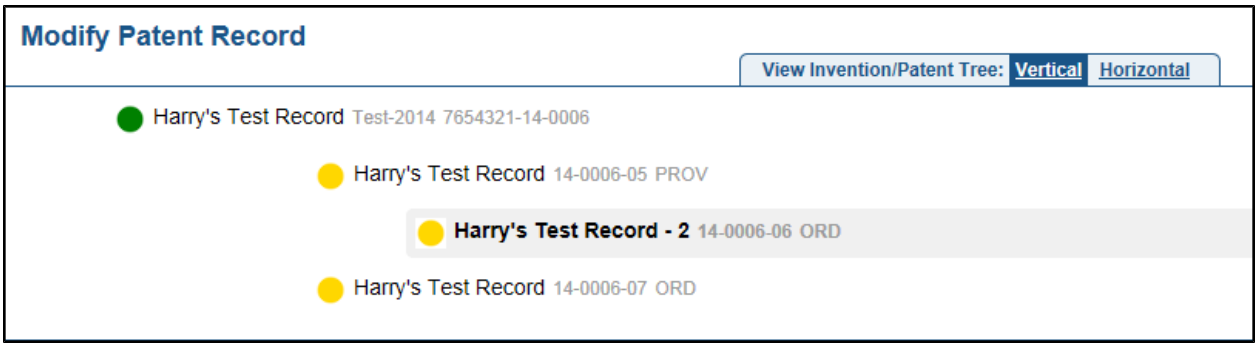


Figure 119: Modify Patent Record Screen Displaying Linked Patents

7.4 Bulk Uploads

7.4.1 Upload Invention Reports in a Data Stream

NOTE: The option to upload data streams is only displayed if the organization has been granted the ability to perform batch uploads by the NIH administrator.
For information on obtaining S2S credentials, please refer to the S2S Guide for eRA Web Services.

To upload invention reports into the iEdison system via a data stream:

1. Select **Main Menu** tab.
2. Select the **Upload iEdison Invention Report DataStream** hyperlink to access the *Upload iEdison Invention/Patent Reports - Select File to Upload* screen.

Figure 120: Upload iEdison Invention/Patent Reports - Select File to Upload Screen

3. Click the **Browse** button and select the file or type the file location in the path and file name field.
4. Click the **Submit** button.

When the **Submit** button is clicked, the *Submission Summary* screen is displayed indicating that the file was successfully uploaded and awaiting processing.

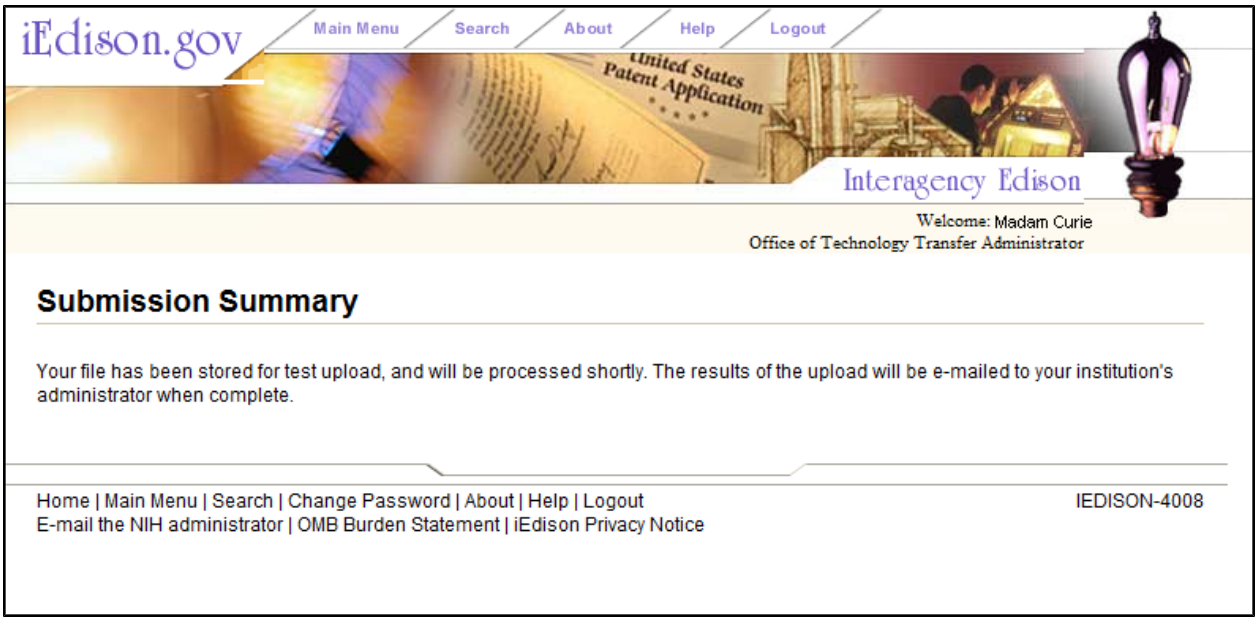


Figure 121: Submission Summary Screen

7.5 Warnings/Errors Regarding Patent Reports

7.5.1 Error Messages for Missing Patent Number

NOTE: The appropriate Patent number is required when a date is entered in any one of the Patent date fields.

For newly created Patent Reports, the system displays the following error messages when the Patent Report is being submitted:

- *If the Provisional Patent Application date is provided the Provisional Patent Application Number is required.*
- *If the Non-Provisional Patent Application date is provided the Non-Provisional Patent Application Number is required.*
- *If the PCT Patent Application date is provided the PCT Patent Application Number is required.*
- *If the Issued Patent Application date is provided the Issued Patent Application Number is required.*

If a Patent Report currently exists without the appropriate Patent numbers, the system displays the following warning messages when the Patent Report is being submitted:

- *No Provisional Application Number is provided.*
- *Non-Provisional Date is provided, but no Non-Provisional Application Number is provided.*
- *PCT Date is provided, but no PCT Application Number is provided.*
- *Issue Date is provided, but no Issue Application Number is provided.*

7.5.2 Error Messages for Waiving NSF Patent Reports

If an attempt is made to change a NSF Patent Report's status to *Waive*, the system verifies that the following notifications do not exist or are deactivated: 220, 221, 240, 223, and 234.

If these notification exist, the system displays the following error message: The following notifications must be cleared before this Patent may be Waived: *<EXTRAMURAL NOTIFICATION NUMBER>. Also, any messages suppressed by the institution also require resolution*.

If none of these notifications exist, then the system verifies that a new Confirmatory License (CL) or Government Support Clause (GSC) document has NOT been uploaded and previously accepted. If a new document has been uploaded, but it has not been accepted, then the following error messages are displayed:

- For CL: *This patent record may not be waived until it is covered by a Confirmatory License citing the Federal Funding Agreement(s) under which it was made that is accepted by the Government.*
- For GSC: *This patent record may not be waived until the Government Support clause is added to the Patent and attached to the patent record and accepted by the Government.*

7.5.3 Parent/Child Link Breakage Notification

If modifications are made to a patent report that result in the existing parent/child relationships being broken, the iEdison system notifies you and asks you how you want to proceed. You can choose to submit the changes as they are or return to the *Modify Invention Report Form* screen.

Figure 122: Modify Patent Report Screen Displaying Parent/Child Link Breakage Message

7.6 Record Locking

The following rules regarding record locking and invention reports are enforced in the iEdison system:

1. Only one user can update a given invention report at a time. Therefore, different users cannot update the same record simultaneously.
2. The same user cannot request a lock on more than one invention report at a time.
3. A lock is cleared after the following:
    a. Successful completion of a modification that updates the record
    b. When a record modification is canceled
    c. When the user is logged out of the system (regardless of whether the user requested to log out or the session timed out)
    d. When the specified number of session minutes has expired
        i. The current default specified for the time a lock can be held is 90 minutes.
4. An appropriate error message is displayed when a user attempts to modify a record that they no longer retain a lock on.
5. An appropriate error message is displayed when a user attempts to modify a record that is locked by another user.

8 Utilization Report Information

iEdison has the following Utilization Report functionality:

- Adding a Utilization Report
- Searching for a Utilization Report
- Modifying a Utilization Report

NOTE: Not all agencies require an annual Utilization Report.

8.1 Add a New Utilization Report

To add a new Utilization Report:

1. Select **Main Menu** tab.
2. Select the **Create a Utilization Report** hyperlink to access the *Utilization Report Search - Search for iEdison Utilization Report* screen.
3. Search for an invention report you want to create a new utilization report for. For more information please refer to the Search for a Utilization Report topic.
4. On the *Results for Invention Report Search* screen, click the **Manage Utilization Reports** button.

Figure 123: Manage Utilization Reports Displaying the Reporting Year Field

5. Enter the reporting year for the Utilization Report that you want to create.
6. Click the **Submit** button to display the *Add Utilization Report* screen.

NOTE: A different version of the Utilization Report will appear if utilization is being reported for 2001 or before 2001.

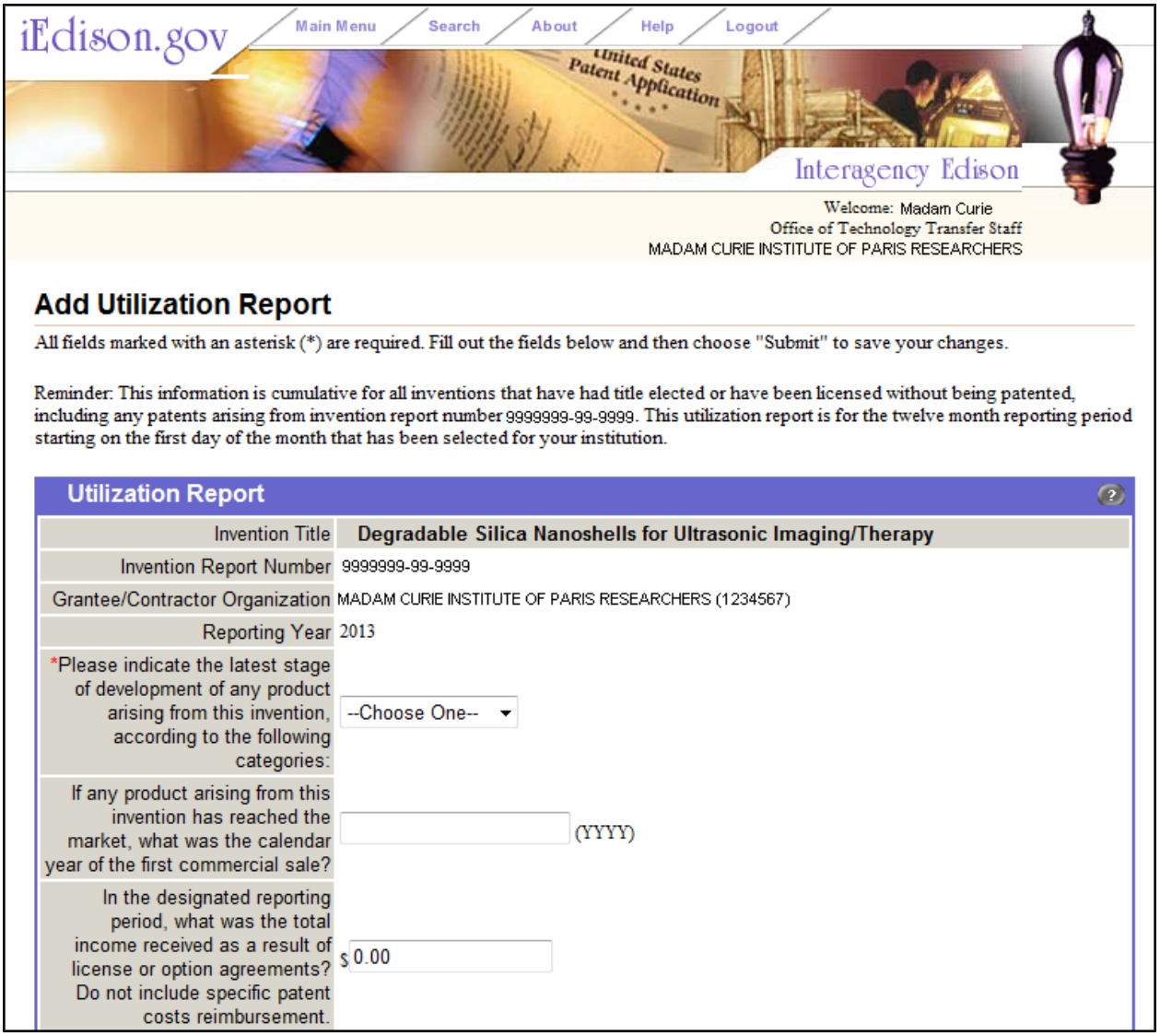


Figure 124: Top Half of the Add Utilization Report

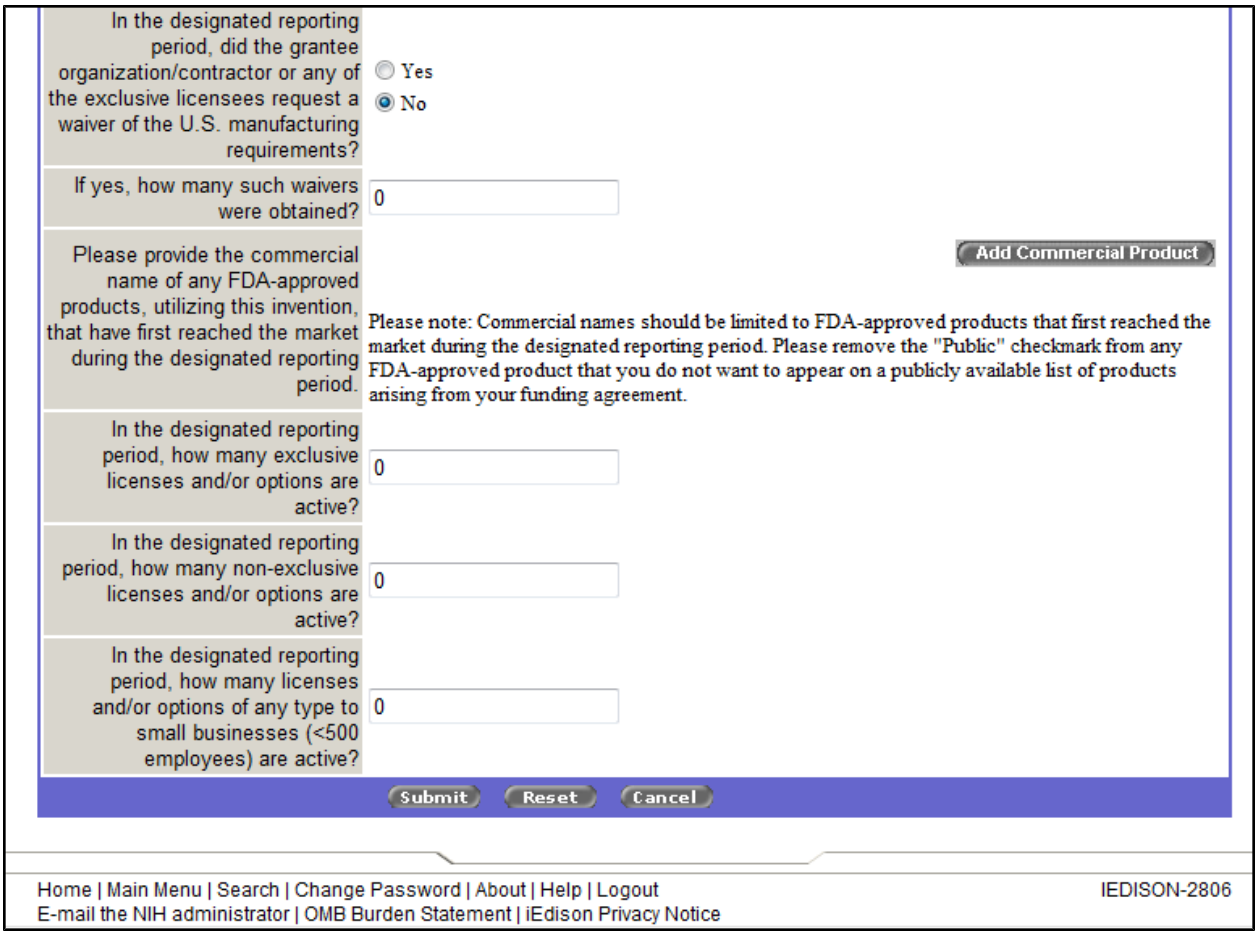


Figure 125: Bottom Half of the Add Utilization Report

Note the following:

1. Users with the TTO Administrative and the TTO User role can create or modify a Utilization Report.
2. If a utilization report for the reporting year chosen does not exist, you will see the *Add Version of the Utilization Report* screen.
3. If a utilization report for the report year chosen already exists, you will see the *Modify Version of the Utilization Report* screen with the last saved data values displayed.
4. If you do not have access to add or modify the utilization report, the view-only version of the screen is displayed.

NOTE: Required fields are noted by an asterisk.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

7. Enter the new utilization report information.
8. To add a commercial product, click the **Add Commercial Product** button.

9. Perform one of the following options:
    a. Click the **Submit** button to enter the information.
    b. Click the **Reset** button to reset the information that was changed.
    c. Click the **Cancel** button to cancel the changes and return to the *Main Menu* screen.

When the **Submit** button is clicked, the system updates the utilization information and displays the *Add Utilization Report - Utilization Verification* screen.

10. Perform one of the following options on the *Add Utilization Report Verification* screen:
    a. Click the **Submit** button is clicked to submit the information.
    b. Click the **Modify Report** button to return to the previous screen and modify the utilization report.

When the **Submit** button is clicked, the system saves the utilization information and displays the *Manage Utilization Reports - Utilization Report Confirmation* screen.

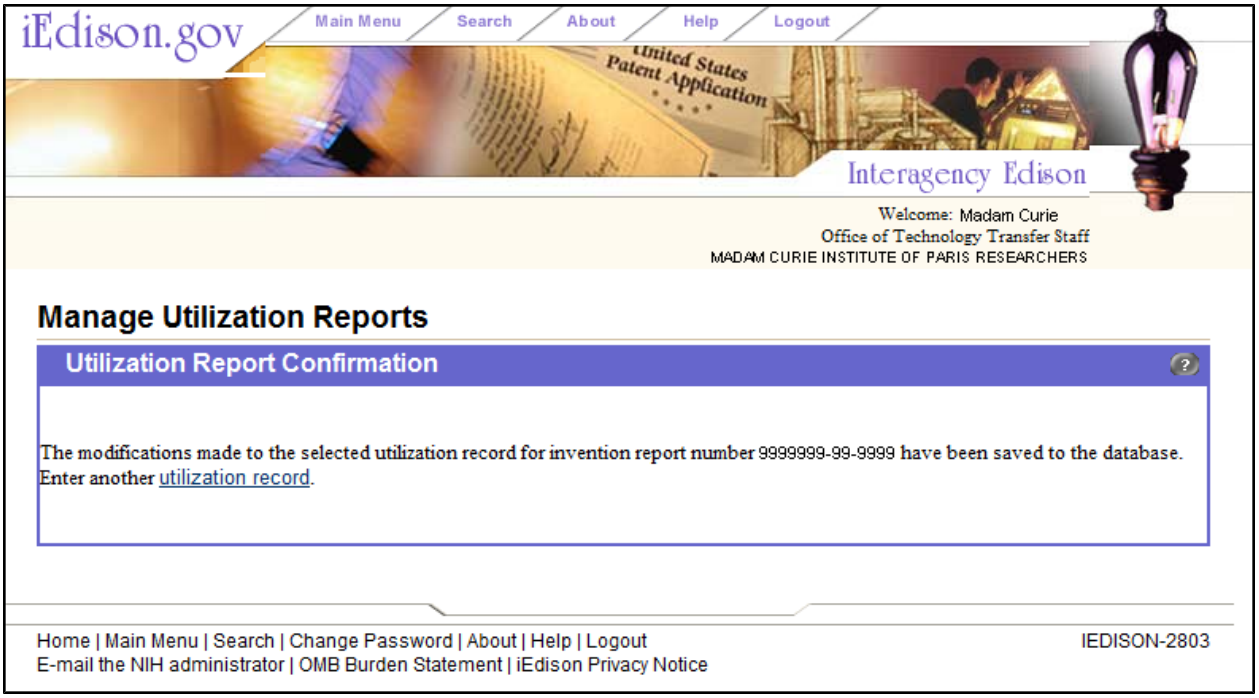


Figure 126: Manage Utilization Reports - Utilization Report Confirmation Screen

8.2 Search for a Utilization Report

The search fields on this *Invention Report Search* screen are all optional. Use any desired combination of the fields to perform the utilization report search.

To search for an Utilization Report:

1. Select **Main Menu** tab.
2. Select the **Search/Modify Existing Utilization Reports** hyperlink to access the *Utilization Report Search - Search for iEdison Utilization Report* screen.
3. Search for an invention report you want to create a new utilization report for.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

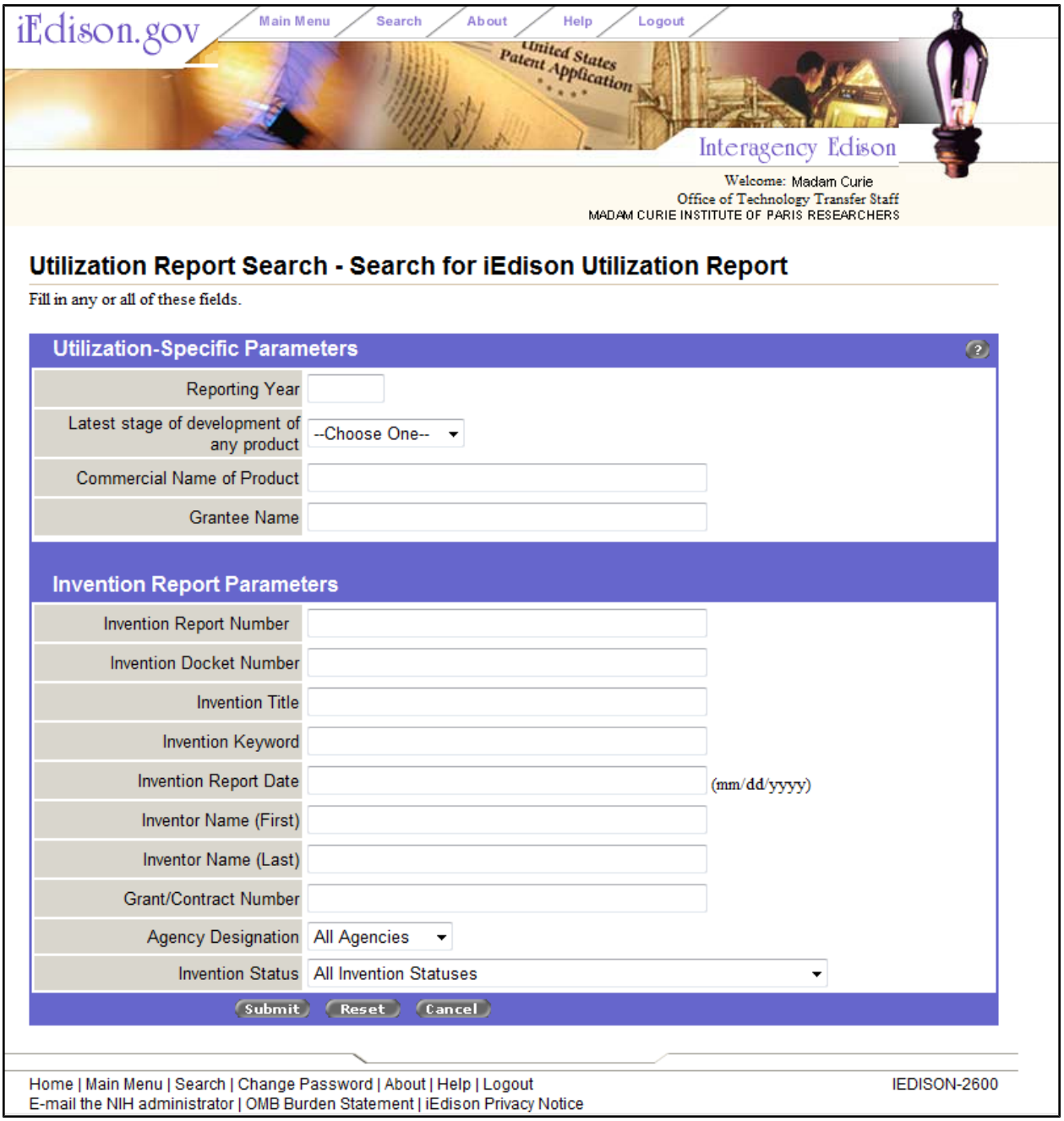


Figure 127: Utilization Report Search - Search for iEdison Utilization Report

4. Perform one of the following options:
    a. Click the **Submit** button to enter the search and open the *Invention Report Search Results* screen.
    b. Click the **Reset** button to clear our the search criteria.
    c. Click the **Cancel** button to return to the *Main Menu* screen.

When the **Submit** button is clicked, the system displays a list of matching invention reports.

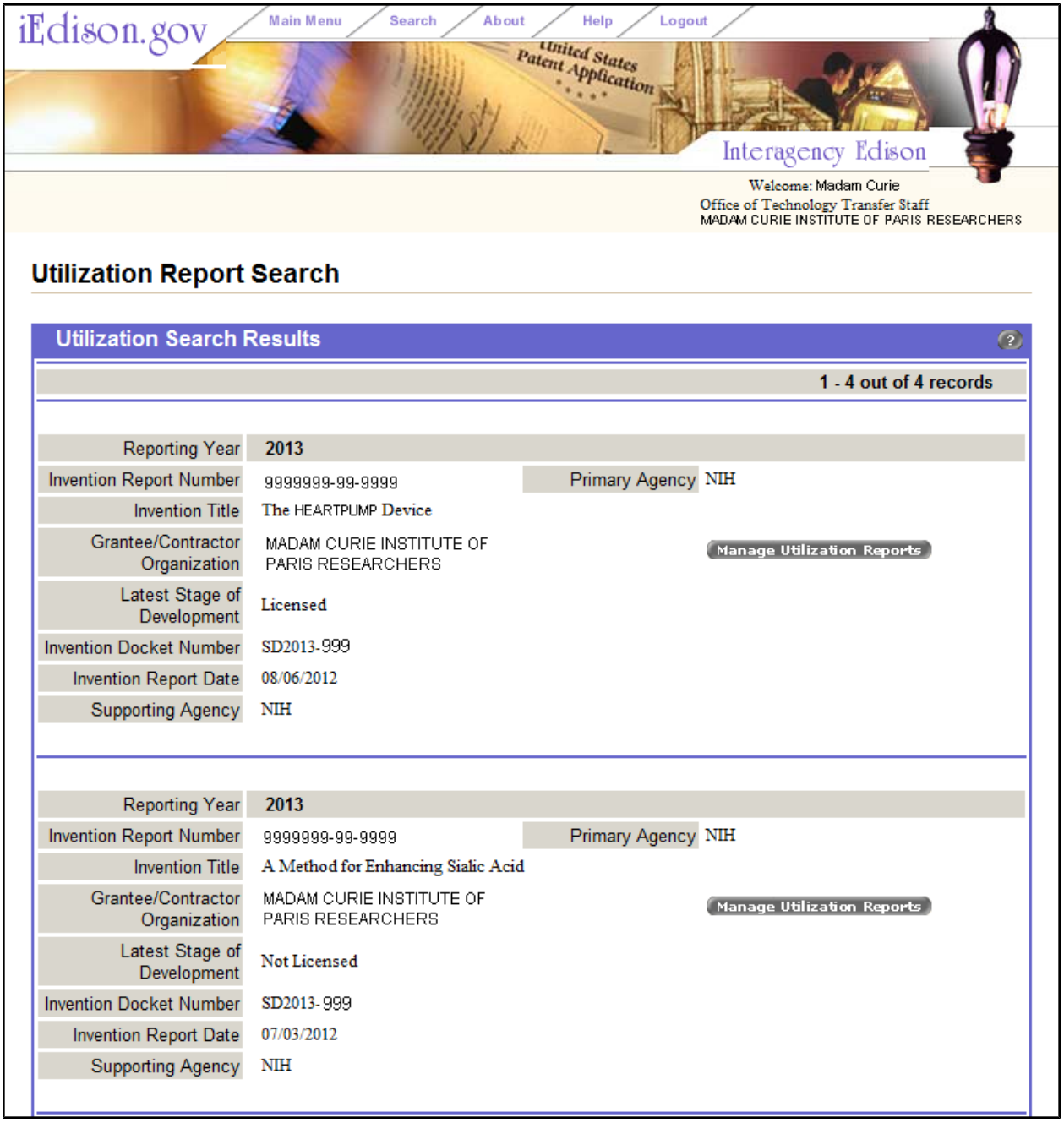


Figure 128: Top Half of the Utilization Report Search Results Screen

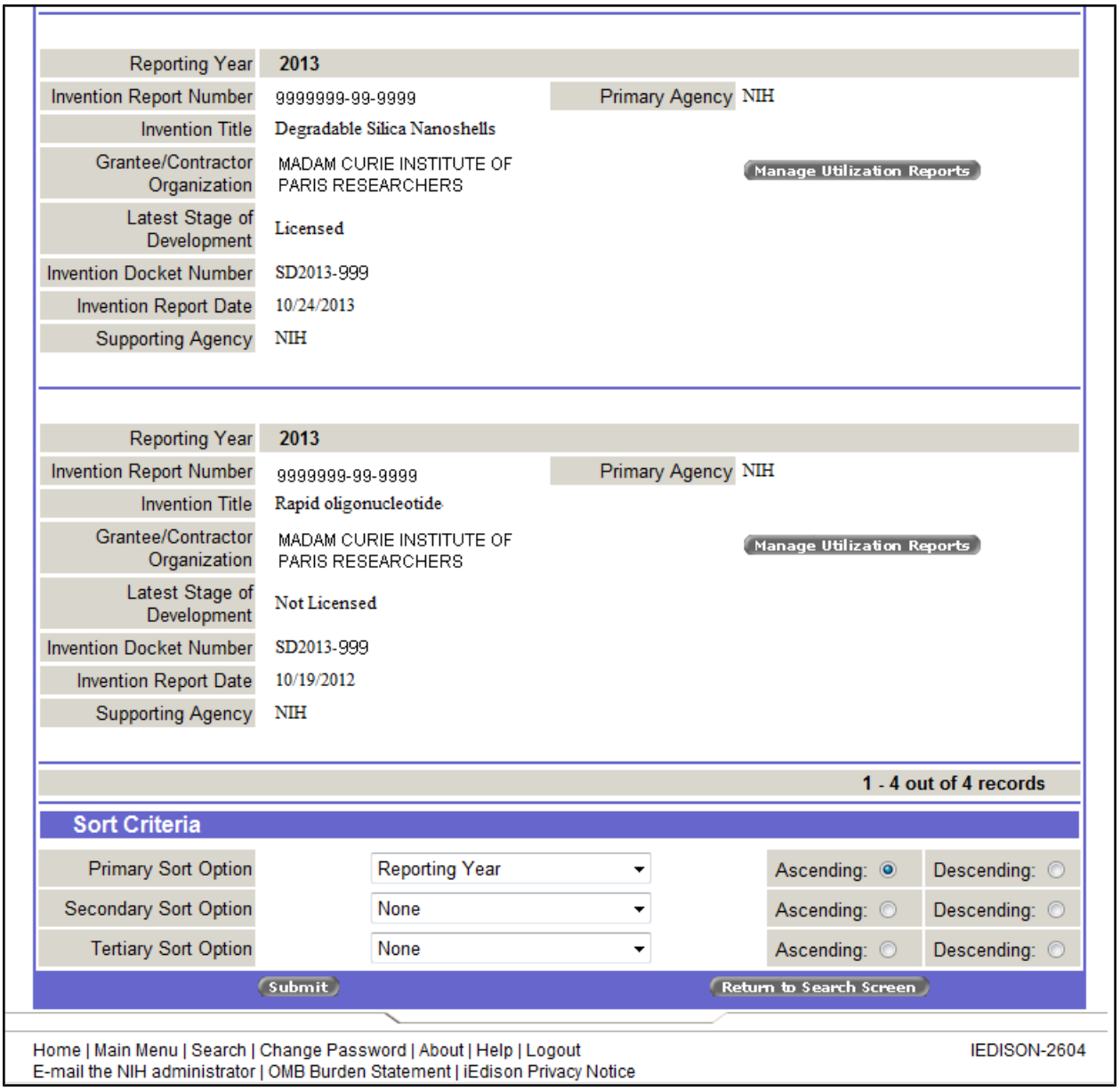


Figure 129: Bottom Half of the Utilization Report Search Results Screen

NOTE: Results are sorted alphabetically by **Reporting Year** in ascending order.

5. To sort the search results, use the sort fields in the *Sort Criteria* section and click the **Submit** button.
6. To move forward or backwards in the search results, click the **Page Number**, **Prev**, and/or **Next** hyperlinks.

Figure 130: Utilization Search Results Navigation Buttons

7. To manage Utilization Reports, click the **Manage Utilization Reports** button. For more information please refer to the Modify Utilization Report topic.

8.3 Modify a Utilization Report

To view or modify a utilization report:

1. Select **Main Menu** tab.
2. Select the **Search/Modify Existing Utilization Reports** hyperlink to access the *Utilization Report Search - Search for iEdison Utilization Report* screen.
3. Search for an invention report you want to modify a new utilization report for. For more information please refer to the Search for a Utilization Report topic.
4. On the *Utilization Report Search - Utilization Search Results* screen, click the **Manage Utilization Reports** button.

When the **Manage Utilization Reports** button is clicked, the system displays the *Modify Utilization Report* screen.

NOTE: If you do not have access to add or modify the utilization report, the view only version of the screen is displayed.

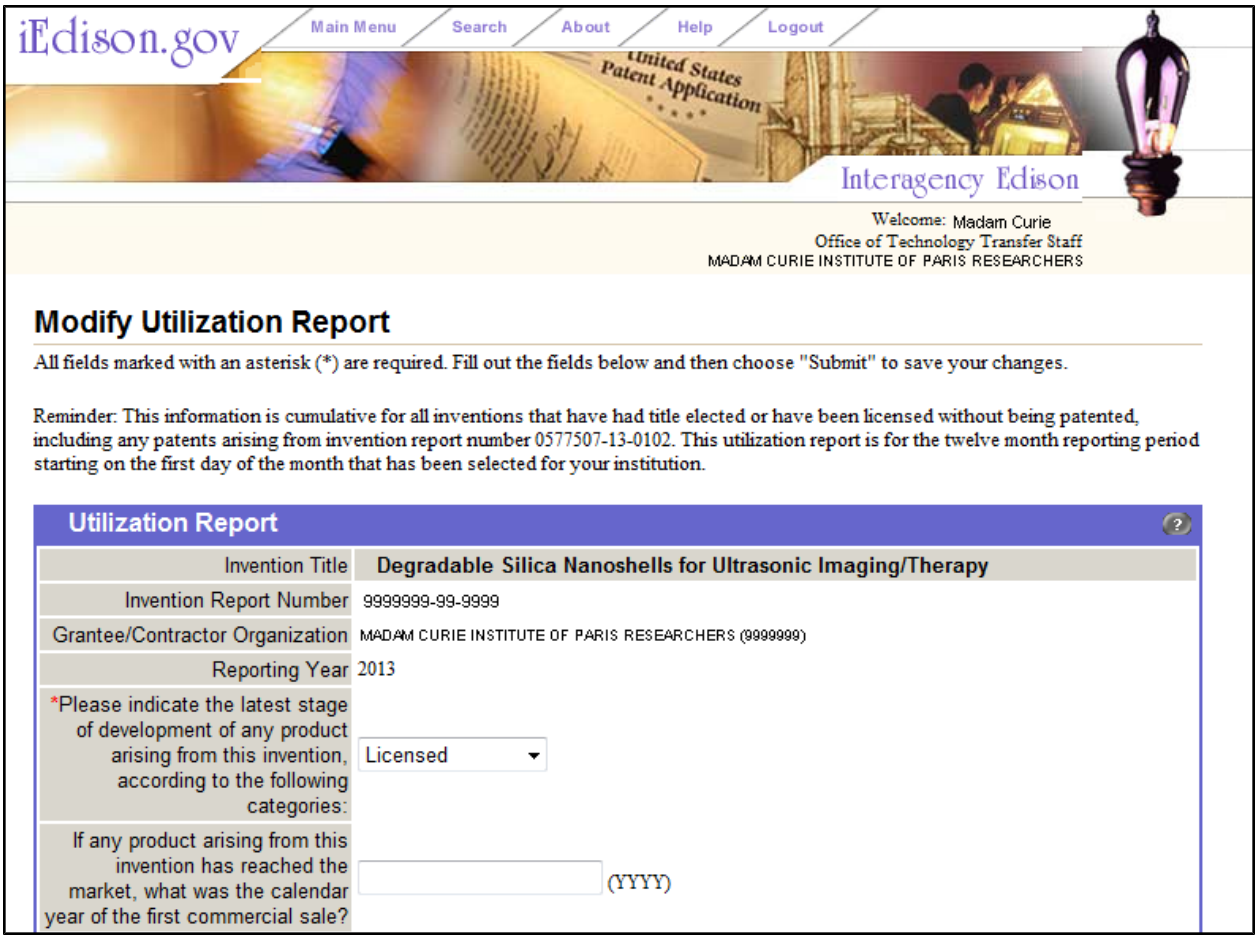


Figure 131: Top Half of the Modify Utilization Report Screen

In the designated reporting period, what was the total income received as a result of license or option agreements? Do not include specific patent costs reimbursement.	$ 0.00
In the designated reporting period, did the grantee organization/contractor or any of the exclusive licensees request a waiver of the U.S. manufacturing requirements?	○ Yes ◉ No
If yes, how many such waivers were obtained?	0
Please provide the commercial name of any FDA-approved products, utilizing this invention, that have first reached the market during the designated reporting period.	Add Commercial Product Please note: Commercial names should be limited to FDA-approved products that first reached the market during the designated reporting period. Please remove the "Public" checkmark from any FDA-approved product that you do not want to appear on a publicly available list of products arising from your funding agreement.
In the designated reporting period, how many exclusive licenses and/or options are active?	0
In the designated reporting period, how many non-exclusive licenses and/or options are active?	0
In the designated reporting period, how many licenses and/or options of any type to small businesses (<500 employees) are active?	0

Submit Reset Cancel

Home | Main Menu | Search | Change Password | About | Help | Logout IEDISON-2807
E-mail the NIH administrator | OMB Burden Statement | iEdison Privacy Notice

Figure 132: Bottom Half of the Modify Utilization Report Screen

NOTE: Required fields are noted by an asterisk.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

For Utilization Reports submitted in 2001 and prior years, the **Latest State of Development** field displays differently. The available values are *Basic R and D*, *Pre-clinical*, *Prototype*, *FDA (NDA/PLA)*, *Clinical* and *Market*.

*Please indicate the latest stage of development of any product arising from this invention, according to the following categories:	--Choose One-- The current value for this field is **Basic R and D**. This value is no longer valid. If you wish to make any change in this record, you must choose another value before you submit.

Figure 133: Latest Stage of Development Field for 2001 and Prior Years

5. Edit or review utilization information.
6. To add a commercial product, click the **Add Commercial Product** button.
7. Perform one of the following options:
    a. Click the **Submit** button to enter the information.
    b. Click the **Reset** button to reset the information that was changed.
    c. Click the **Cancel** button to cancel the changes and return to the *Main Menu* screen.

When the **Submit** button is clicked, the utilization information is updated and the *Modify Utilization Report Verification* screen is displayed.

8. Perform one of the following options on the *Modify Utilization Report Verification* screen:
    a. Click the **Submit** button is clicked to submit the information.
    b. Click the **Modify Report** button to return to the previous screen and modify the utilization report.

When the **Submit** button is clicked, the system saves the utilization information and displays the *Manage Utilization Reports - Utilization Report Confirmation* screen.

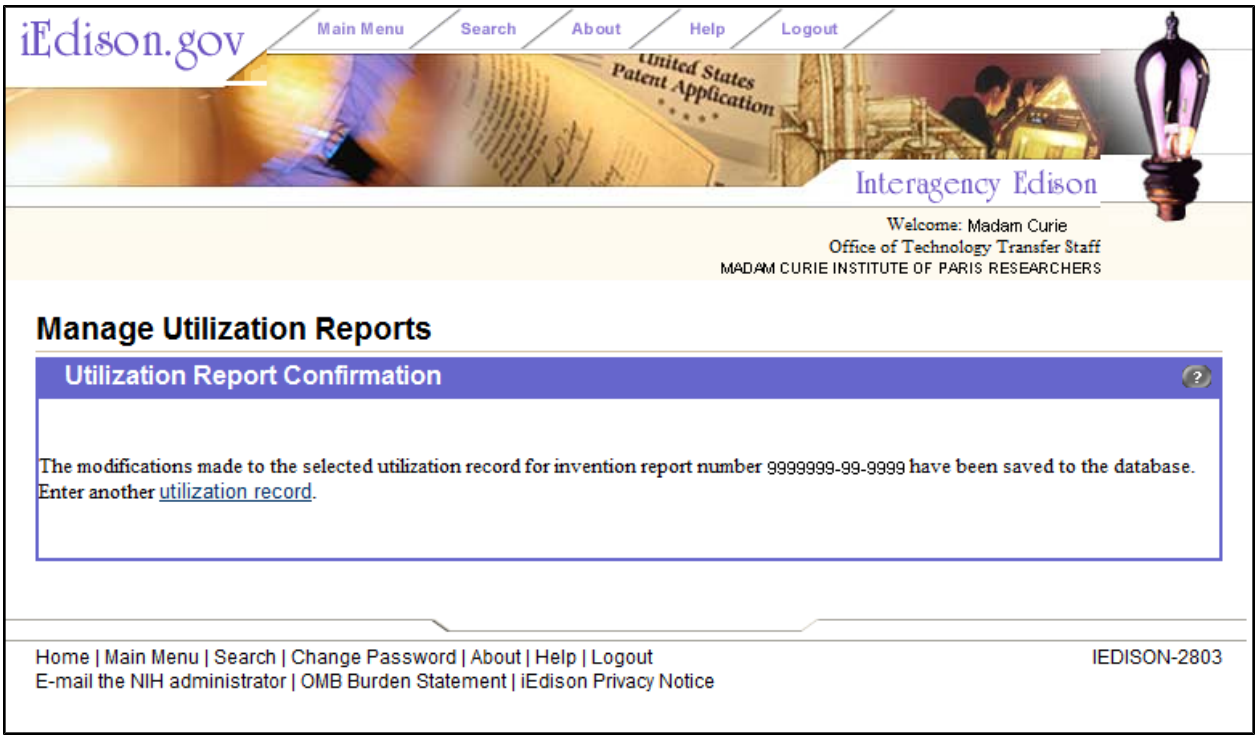


Figure 134: Manage Utilization Reports - Utilization Report Confirmation Screen

8.4 Record Locking

The following rules regarding record locking and invention reports are enforced in the iEdison system:

1. Only one user can update a given invention report at a time. Therefore, different users cannot update the same record simultaneously.
2. The same user cannot request a lock on more than one invention report at a time.
3. A lock is cleared after the following:
    a. Successful completion of a modification that updates the record
    b. When a record modification is canceled
    c. When the user is logged out of the system (regardless of whether the user requested to log out or the session timed out)
    d. When the specified number of session minutes has expired
        i. The current default specified for the time a lock can be held is 90 minutes.
4. An appropriate error message is displayed when a user attempts to modify a record that they no longer retain a lock on.
5. An appropriate error message is displayed when a user attempts to modify a record that is locked by another user.

9 Generating iEdison Reports

The iEdison system allows you to generate different types of reports:

- Invention Report
- Patent Report
- Utilization Report

To access the *Report Menu* screen:

1. Select **Main Menu** tab.
2. Select the **View or Download Reports on iEdison Records** hyperlink.
3. Select one of the following hyperlinks:
   a. Generate Invention Report
   b. Generate Patent Report
   c. Generate Utilization Report

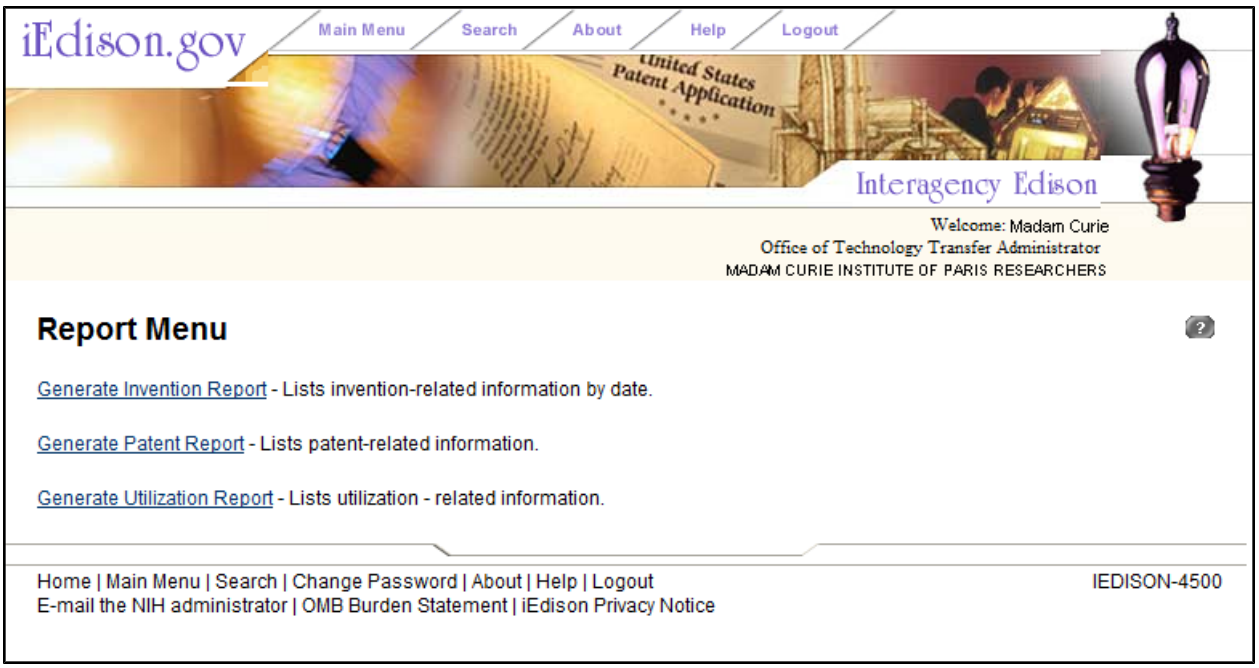


Figure 135: Report Menu Screen

9.1 Generate Invention Report

To access the Invention report:

1. Select the **Main Menu** tab.
2. Click the **View or Download Reports on iEdison Records** hyperlink to access the *Report Menu* screen.
3. Select the **Generate Invention Report** hyperlink to access the *Generate Invention Report* screen which opens in a separate browser window.

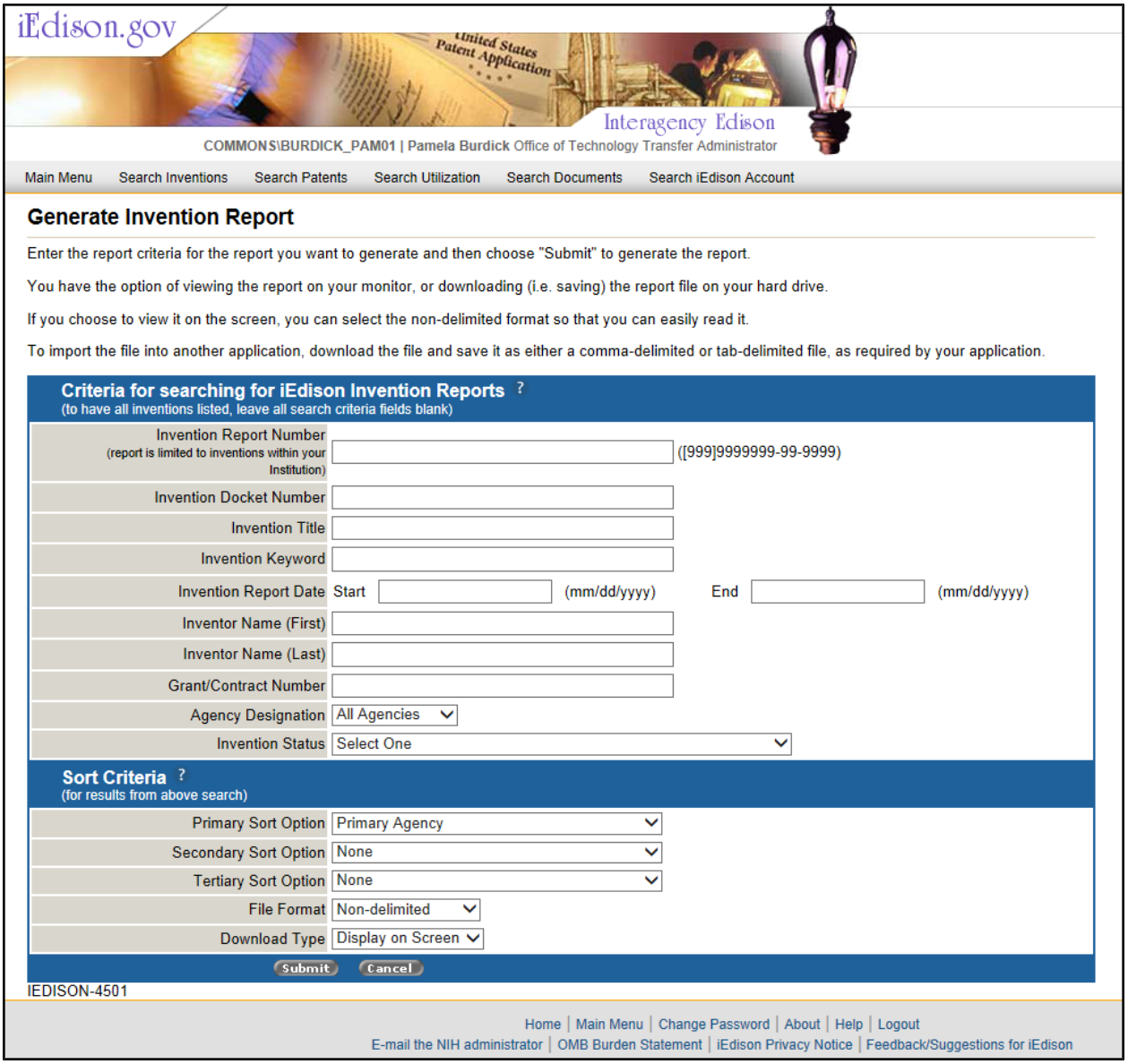


Figure 136: Generate Invention Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

4. Enter the desired report information:
    a. You can enter a primary, secondary, and tertiary sort order for the report results.
    b. For viewing the report on the screen, choose *Non- Delimited Report* as the file format and *Display on Screen* as the download type.
    c. For downloading the report, choose *Comma Delimited* or *Tab Delimited* as the file format and *Download to Disk* as the download type.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file or (XXXX.txt) if you are downloading to a tab-delimited file.

5. Perform one of the following options:
    h. Click the **Submit** button to generate the report.
    i. Click the **Cancel** button to exit the screen.

When the **Submit** button is clicked and the *Display on Screen* as the download type, the *Invention Report Details* screen is displayed.

Invention Report Report

The report you requested is displayed below.
Click on the invention report number to go directly to the selected invention report record.

Invention Report Number:	9999999-99-9999
Grantee/Contractor Organization:	MADAM CURIE INSTITUTE OF PARIS RESEARCHERS
Grantee/Contractor Organization Code:	9999999
DOE S Number:	
Invention Disclosure Receipt Date:	
Invention Disclosure Reject Date:	
Research Tools Guidelines Agreement Accepted:	
Research Tools Guidelines Agreement Accepted Date:	
Invention Docket Number:	2014-022
Invention Title:	Laboratory selection procedures to develo
Invention Keywords:	

Inventors:

- Madam Curie
- Albert Einstein
- Sherlock Holmes
- Emelia Earhart
- Dr. Watson
- Thomas Edison

Invention Report Date:	08/29/2013
Primary Agency:	DOE
Supporting Agencies:	

- DOE: DE-EE0003373

Date of 1st publication on sale or public use:	
Title Election Date:	
Invention Status:	UNDER EVALUATION
Not Elect Title Reason:	
Not Elect Title - Other Text:	
Waive Date:	
Parent Invention Report Number:	
Other Organizations:	
Subcontracts:	
Created Date:	11/25/2013 12:08 PM
Last Updated Date:	01/30/2014 10:41 PM

Figure 137: Generated Invention Report

6. Select the hyperlink on the invention report number to view the selected invention report details. The *Modify Invention Report* screen is displayed for the selected invention report.
7. If the download type selected was *Download to Disk*, the file download prompt is displayed.

9.2 Generate Patent Report

To access the Patent report:

1. Select the **Main Menu** tab.
2. Click the **View or Download Reports on iEdison Records** hyperlink to access the *Report Menu* screen.
3. Select the **Generate Patent Report** hyperlink to access the *Generate Patent Report* screen which opens in a separate browser window.

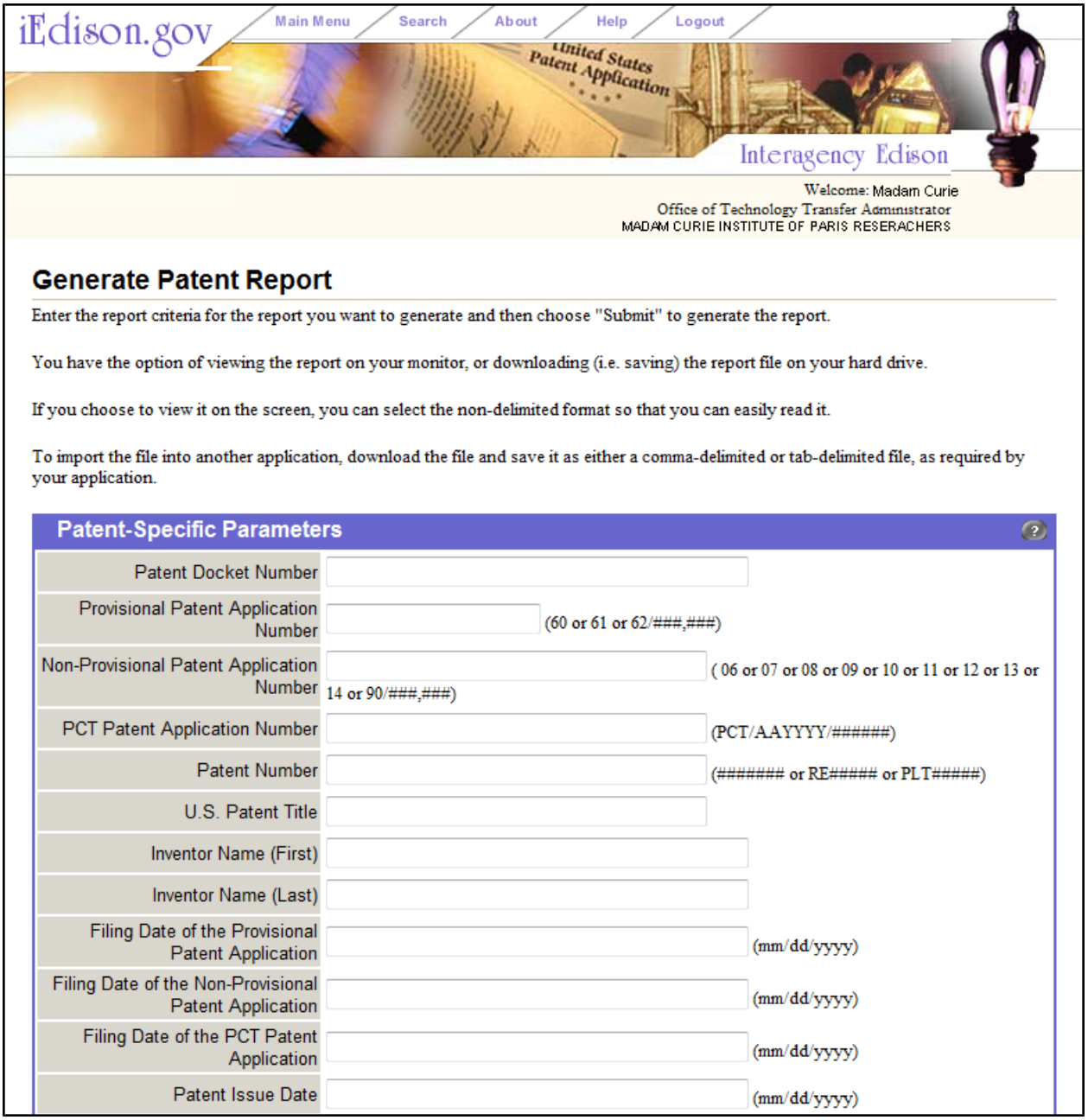


Figure 138: Top Half of the Generate Patent Report Screen

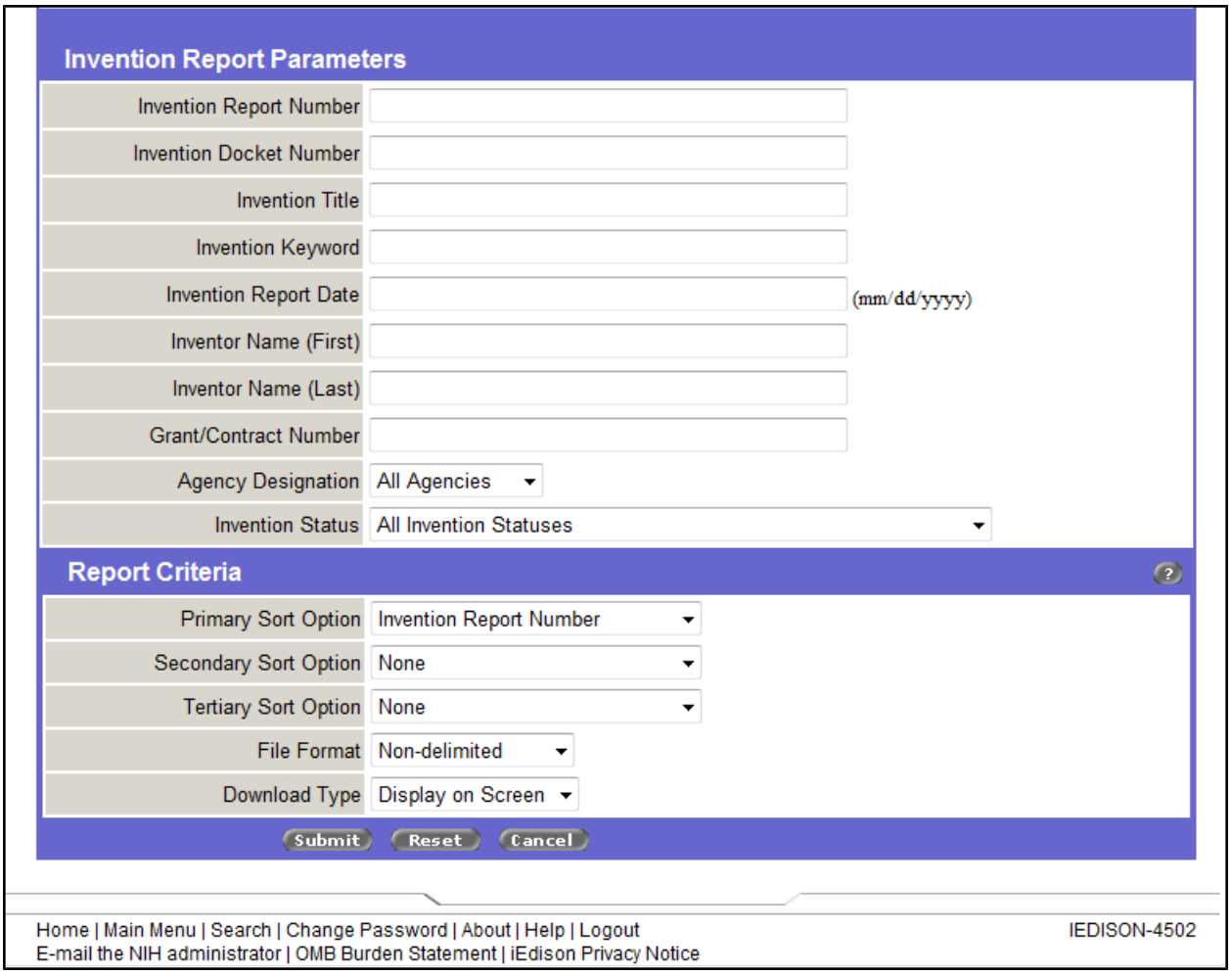


Figure 139: Bottom Half of the Generate Patent Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

4. Enter the desired report information:
    a. You can enter a primary, secondary, and tertiary sort order for the report results.
    b. For viewing the report on the screen, choose *Non- Delimited Report* as the file format and *Display on Screen* as the download type.
    c. For downloading the report, choose *Comma Delimited* or *Tab Delimited* as the file format and *Download to Disk* as the download type.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file or (XXXX.txt) if you are downloading to a tab-delimited file.

5. Perform one of the following options:
    h. Click the **Submit** button to generate the report.
    i. Click the **Cancel** button to exit the screen.

When the **Submit** button is clicked and the *Display on Screen* as the download type, the *Patent Report* screen is displayed.

Patent Report

The report you requested is displayed below.
Click on the invention report number to go directly to the selected invention report record.

Invention Disclosure Number:	9999999-99-9999
DOE S Number:	
Organization:	MADAM CURIE INSTITUTE OF PARIS RESEARCHERS
Confirmatory License Receipt Date:	
Confirmatory License Reject Date:	
Government Support Clause Receipt Date:	
Government Support Clause Reject Date:	
Patent Docket Number:	99-9999-99
Provisional Application:	
Filing Date of the Provisional Application:	03/18/2014
Non-Provisional Application Number:	
Filing Date of the Non-Provisional Application:	
PCT Application Number:	
Filing Date of PCT Application:	03/18/2014
Patent Number:	
Patent Issue Date:	
Patent Expiration Date:	
Type of Application:	ORD
U.S. Patent Title:	A Richer Model of Cloud App Markets
Keywords:	

Inventors:
- Vinod Ganapathy

Foreign Filings:

Patent Status:	INSTITUTION RETAINS RIGHTS
Other Party Name:	
Parent Patent Docket Number:	
Parent Patent Organization Code:	
Other Related Invention:	

Other Organizations:

Created Date:	03/18/2014 11:04 AM
Last Updated Date:	

Figure 140: Patent Report

6. Select the hyperlink on the patent report number to view the selected invention report details. The *Modify Patent Report* screen is displayed for the selected patent report.
7. If the download type selected was *Download to Disk*, the file download prompt is displayed.

9.3 Generate Utilization Report

To access the Utilization report:

1. Select the **Main Menu** tab.
2. Click the **View or Download Reports on iEdison Records** hyperlink to access the *Report Menu* screen.
3. Select the **Generate Utilization Report** hyperlink to access the *Generate Utilization Report* screen which opens in a separate browser window.

Figure 141: Top half of the Generate Utilization Report Screen

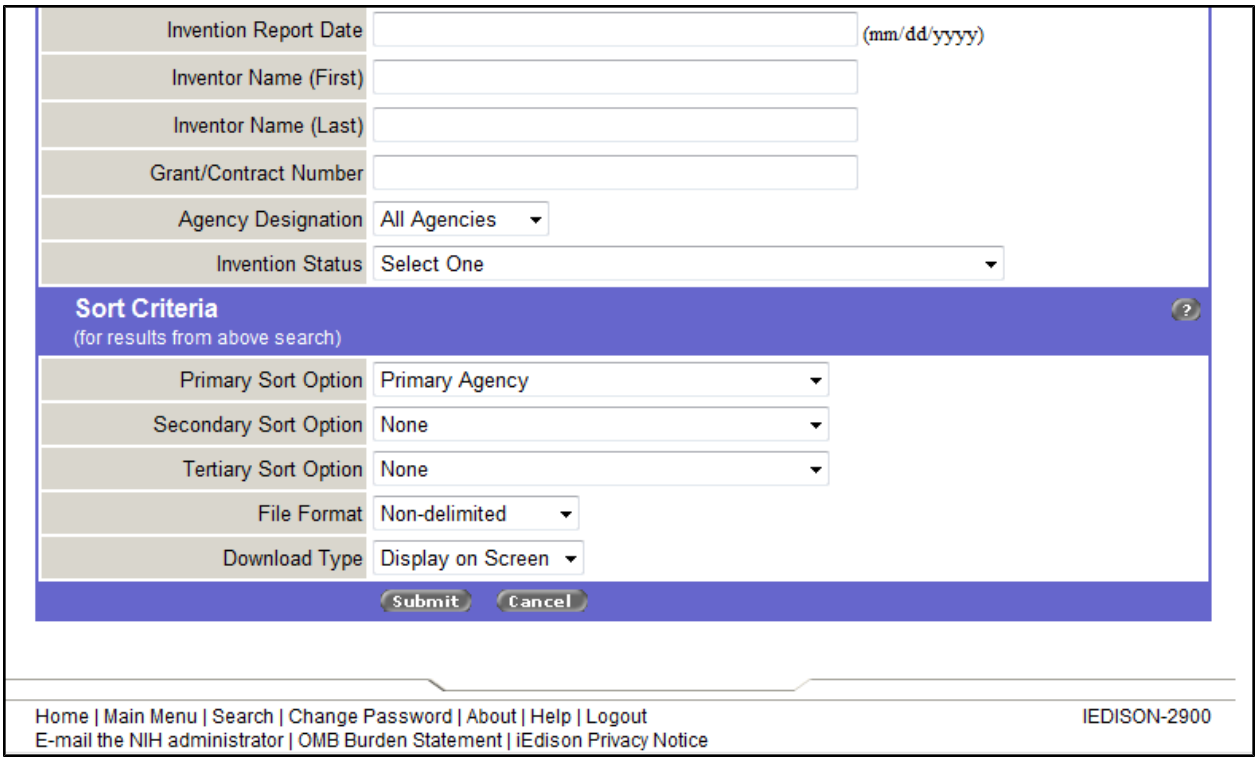


Figure 142: Bottom half of the Generate Utilization Report Screen

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

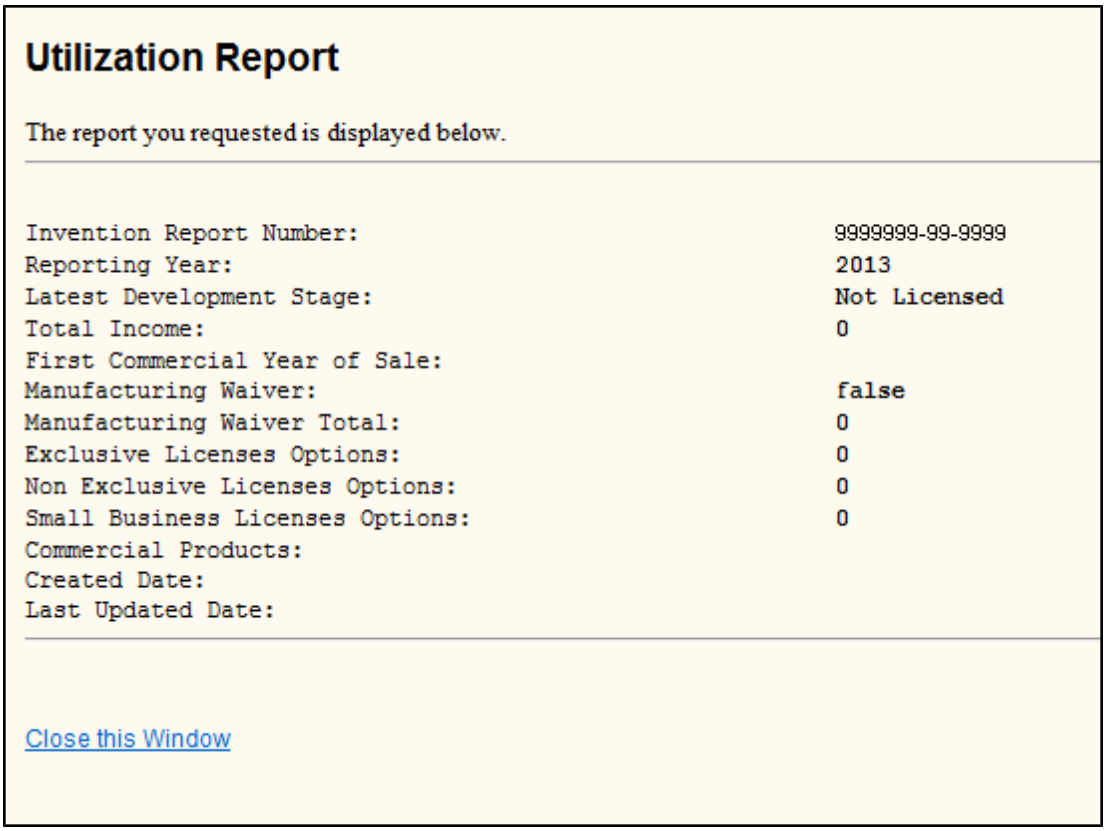
4. Enter the desired report information, noting the following:
   a. You can enter a primary, secondary, and tertiary sort order for the report results.
   b. For viewing the report on the screen, choose *Non- Delimited Report* as the file format and *Display on Screen* as the download type.
   c. For downloading the report, choose *Comma Delimited* or *Tab Delimited* as the file format and *Download to Disk* as the download type.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file or (XXXX.tab) or (XXXX.txt) if you are downloading to a tab-delimited file.

---

5. Perform one of the following options:
   a. Click the **Submit** button to generate the report.
   b. Click the **Cancel** button to exit the screen.

When the **Submit** button is clicked and the *Display on Screen* as the download type, the *Utilization Report* screen is displayed.



Utilization Report

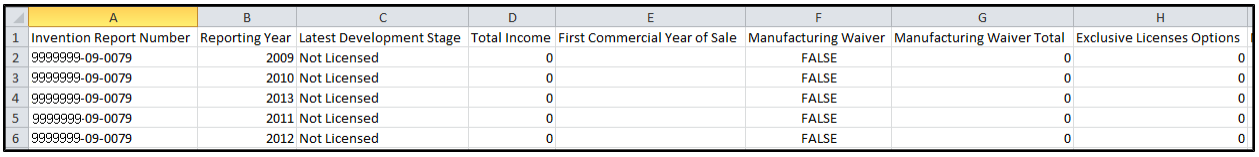
The report you requested is displayed below.

Invention Report Number:	9999999-99-9999
Reporting Year:	2013
Latest Development Stage:	Not Licensed
Total Income:	0
First Commercial Year of Sale:	
Manufacturing Waiver:	false
Manufacturing Waiver Total:	0
Exclusive Licenses Options:	0
Non Exclusive Licenses Options:	0
Small Business Licenses Options:	0
Commercial Products:	
Created Date:	
Last Updated Date:	

Close this Window

Figure 143: Utilization Report Screen

6. If the download type selected was *Download to Disk*, the file download prompt is displayed.



	A	B	C	D	E	F	G	H
1	Invention Report Number	Reporting Year	Latest Development Stage	Total Income	First Commercial Year of Sale	Manufacturing Waiver	Manufacturing Waiver Total	Exclusive Licenses Options
2	9999999-09-0079	2009	Not Licensed	0		FALSE	0	0
3	9999999-09-0079	2010	Not Licensed	0		FALSE	0	0
4	9999999-09-0079	2013	Not Licensed	0		FALSE	0	0
5	9999999-09-0079	2011	Not Licensed	0		FALSE	0	0
6	9999999-09-0079	2012	Not Licensed	0		FALSE	0	0

Figure 144: Sample Utilization Report in Excel

9.4 Download Report Information

Report data can be downloaded from the iEdison system in two different formats: comma delimited or tab delimited.

To download an invention, a patent, or a utilization report data:

1. From the *Generate Invention Report - Report Criteria* screen or the *Generate Patent Report - Report Criteria* screen or the *Generate Utilization Report - Report Criteria*, depending on which type of data you are downloading, select the following report options:
   a. Select *Download to Disk* as the download type.
   b. Choose *Comma Delimited* or *Tab Delimited* as the file format.

NOTE: You can enter a primary, secondary, and tertiary sort order for the download.

2. Click the **Submit** button to download the report data.

The file download prompt screen is displayed.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file or (XXXX.txt) if you are downloading to a tab-delimited file.

3. Follow the screen prompts to complete the download.

10 Viewing Notification Messages

To view your notification messages perform the following steps:

1. Select **Main Menu** tab.
2. Click the **View Notification Messages** hyperlink .

When the **View Notification Messages** hyperlink is clicked, the system displays the *View Notification Messages* screen.

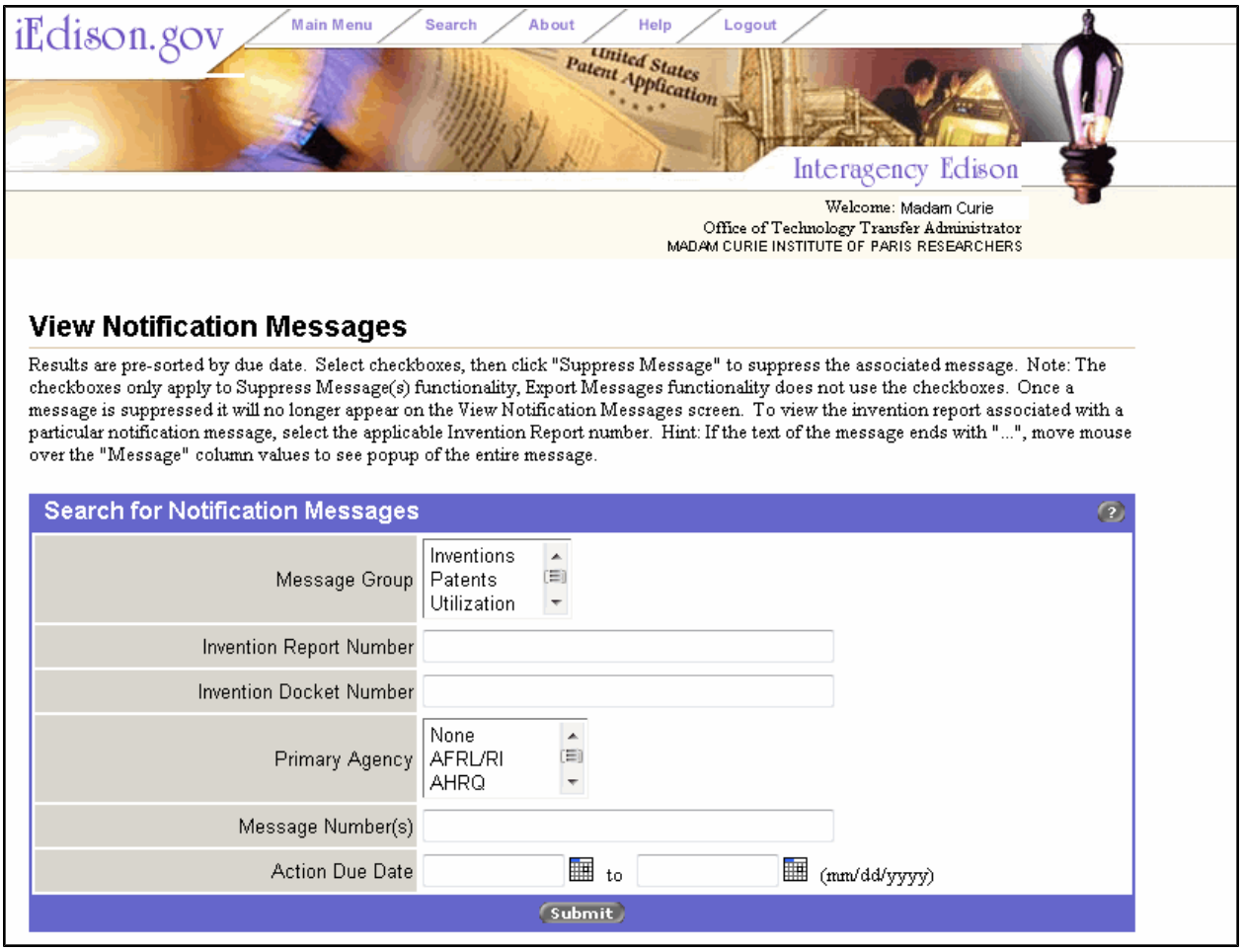


Figure 145: Top Half of the View Notification Messages Screen

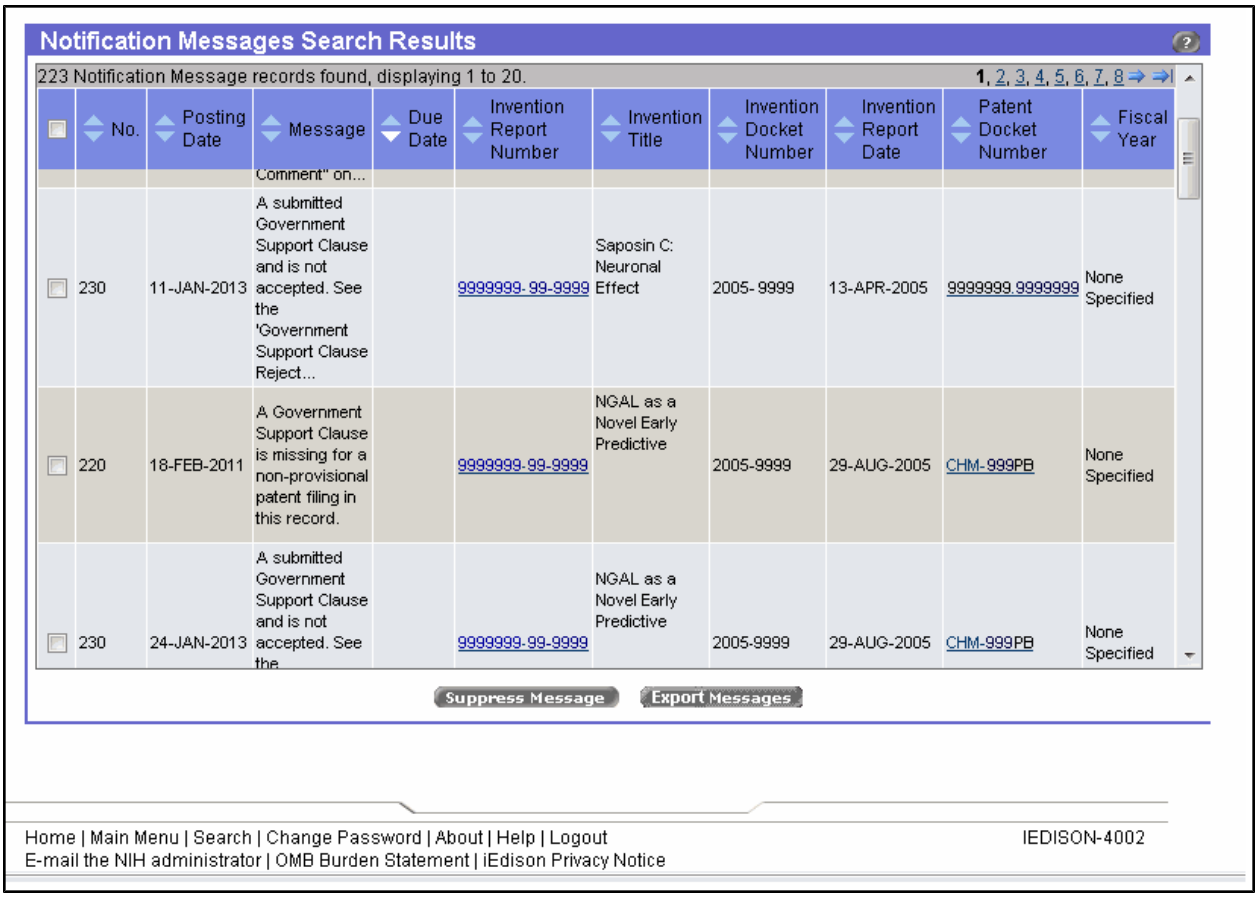


Figure 146: Bottom Half of the View Notification Messages Screen

10.1 Search for Notification Messages

Perform a search options as follows:

1. Enter or select the appropriate search criteria in the *Search for Notification Messages* section.
2. Click the **Submit** button.

When the **Submit** button is clicked, a list of notification messages is displayed. The search results are sorted by the message date and time.

The list of notification messages includes only those inventions that have been assigned to you and that you have not suppressed.

4. To move forward or backwards in the search results, click the appropriate **page number** or the **forward** or **backward** arrows located on the right side above the search results.
5. Select the appropriate hyperlink in the **Invention Report Number** column to view the selected invention report details.

When the appropriate hyperlink is clicked, the *Modify Invention Report* screen is displayed for the selected invention report.

10.2 Process a Notification Message

To process a notification message, please see the Process Notification Messages topic.

10.3 Export a Notification Message

Notification messages for each user can be exported and saved in an Excel spreadsheet. It is better to export notification messages before suppressing any notification messages.

To export messages:

1. Select the appropriate check box(es) on the left.
2. To select all the check boxes, select the first check box in the *Header* row in the *Search Results* section.
3. Click the **Export Message** button.

When the **Export Message** button is clicked, the system displays a Excel dialog window to save and/or open the Excel file with the appropriate messages. When the Excel file is closed, the system returns to the *View Notification Messages* screen.

10.4 Suppress a Notification Message

Notification messages for each user can be suppressed so that only messages related to specific invention or patent reports are displayed.

If the column on the left is checked, the system permanently suppresses that message for that user and cannot be undone without a request to the database administrators.

Also suppressing a message does not erase the message count in the weekly e-mail reminder.

NOTE: Administrators can always see all notification messages.

To suppress messages:

1. Select the appropriate check box(es) on the left.
2. To select all the check boxes, select the first check box in the *Header* row in the *Search Results* section.
3. Click the **Suppress Message** button.

When the **Suppress Message** button is clicked, the selected notification messages are removed and the system returns to the *View Notification Messages* screen.

10.5 Process Notification Messages

Notification messages are generated for the following documents and reports:

- Government Confirmatory License
- Government Support Clause
- Invention Disclosure
- Invention Reports
- Other Messages
- Patent Reports
- Utilization Reports

Government Confirmatory License Messages

Message Number	Message	Action Needed
234	*The submitted Confirmatory License is not accepted. See the 'Confirmatory License Reject Comment' in the Patent report screen. 37 CFR Section 401.14(b).*	1. Click the **Patent Docket Number** hyperlink associated with this notification message. 2. Please see the **Confirmatory License Reject Comment** fields on the *Modify Patent Report* screen. 3. Please refer to the Add/Modify Confirmatory License topic.
240	*A Confirmatory License is missing for a non-provisional patent filing in this record. 37 CFR Section 401.14(b).*	1. The Confirmatory License fields on the *Modify Patent Report* screen need to be completed. 2. Click the **Patent Docket Number** hyperlink associated with this notification message. 3. Please refer to the Generate and Submit a Confirmatory License

Table 4: Government Confirmatory License Notification Messages

Message Number	Message	Action Needed
		topic and/or the Add/Modify a Confirmatory License topic.

Table 4: Government Confirmatory License Notification Messages

Government Support Clause Messages

Message Number	Message	Action Needed
220	*A Government Support Clause is missing for a non-provisional patent filing in this record.*	1. The Government Support Clause fields on the *Modify Patent Report* screen need to be completed. 2. Click the **Patent Docket Number** hyperlink associated with this notification message. 3. Please refer to the Add/Modify Government Support Clause topic.
221	*A Government Support Clause is missing for an issued patent in this record.*	1. The Government Support Clause fields on the *Modify Patent Report* screen need to be completed. 2. Click the **Patent Docket Number** hyperlink associated with this notification message. 3. Please refer to the Add/Modify Government

Table 5: Government Support Clause Notification Messages

Message Number	Message	Action Needed
		Support Clause topic.
233	*A submitted Government Support Clause is not accepted. See the 'Government Support Clause Reject Comment' in the Patent report screen. 37 CFR Section 401.14(f)(4).*	1. Click the **Patent Docket Number** hyperlink associated with this notification message. 2. Please see the **Government Support Clause Reject Comment** fields on the *Modify Patent Report* screen. 3. Please refer to the Add/Modify Government Support Clause topic.

Table 5: Government Support Clause Notification Messages

Invention Disclosure Messages

Message Number	Message	Action Needed
120	*No written description of the invention (Disclosure) has been uploaded into iEdison. (37 CFR Section 401.14(c)(1)).*	1. Click the **Invention Report Number** hyperlink associated with this notification message. 2. The **Invention Disclosure** fields on the *Modify Invention Report* screen need to be completed. 3. Please refer to the Add/Modify Invention Disclosure Document topic.
130	*The Invention Disclosure submitted is not accepted. See the 'Invention Disclosure Reject Comment' on the invention report*	1. Click the **Invention Report Number** hyperlink associated with this notification message.

Table 6: Invention Disclosure Notifications

Message Number	Message	Action Needed
	screen.	2. Please see the **Invention Disclosure Reject Comment** field on the *Modify Invention Report* screen. 3. Please refer to the Add/Modify Invention Disclosure Document topic.

Table 6: Invention Disclosure Notifications

Invention Report Messages

Message Number	Message	Action Needed
100	*Title to this invention must be timely elected. (e.g. 37 CFR Section 401.14(c)(2)).*	1. Click the **Invention Report Number** hyperlink associated with this notification message. 2. Select the **Invention Status** as appropriate. 3. Please refer to the Modify Invention Report topic for more information.
140	*Title to this invention must be timely elected. (e.g. FAR 52.227-12).* For DOD and NASA	1. Click the **Invention Report Number** hyperlink associated with this notification message. 2. Select the **Invention Status** as appropriate. 3. Please refer to the Modify Invention Report topic for more information.

Invention Report Messages

Patent Report Messages

Message Number	Message	Action Needed
200	*An initial non-provisional patent application must be timely filed. (e.g. 37 CFR 401.14(c)(3)).*	1. Click the **Invention Report Number** hyperlink associated with this notification message. 2. Search for the **Invention Report Number** associated with the message. 3. Click the **Add Patent Report** button. 4. Please refer to the Add Patent Report topic for more information.
260	*The Provisional Filing is due to expire. Either a non-provisional or a PCT patent application must be timely filed. At least thirty days (30) prior Notice must be given to the Government if the reporting Institution intends to waive rights to this invention.*	1. Click the **Patent Report Number** hyperlink associated with this notification message. 2. Select the **Invention Status** as appropriate. 3. Please refer to the Modify Patent Report topic for more information.

Patent Report Messages

Utilization Report Messages

Message Number	Message	Action Needed
300	*Title to this invention has been elected.*	1. A Utilization Report is due for the prior fiscal year.

Table 7: Utilization Reports

Message Number	Message	Action Needed
	After title has been elected, a Utilization Report must be submitted annually based on the 12-month reporting cycle chosen by this grantee/contractor, a Utilization Report for this invention is due. **NOTE:** This message does not display if message 310 is displayed.	2. Search for the **Invention Report Number** associated with this notification message. a. See the Search for an Invention Report topic. 3. For that Invention Report click on the **Manage Utilization Report** hyperlink. a. See the Add a New Utilization Report topic.
310	*A utilization report must be submitted annually for every invention to which title has been elected. According to a 12-month cycle defined by the grantee/contractor organization, the utilization report for this invention was due on <DUE DATE>.*	1. A Utilization Report is due for the current fiscal year (year 2 or beyond). 2. Search for the **Invention Report Number** associated with this notification message. a. See the Search for an Invention Report topic. 3. For that Invention Report click on the **Manage Utilization Report** hyperlink. a. See the Add a New Utilization Report topic.
400	*Your Organization has not designated a*	1. Within your institution's

Table 7: Utilization Reports

Message Number	Message	Action Needed
	12-month reporting cycle for annual Utilization Reports. A reporting cycle can be designated in the Organizational Profile.	profile a fiscal month has not designated. 2. Please refer to the Institution Profile - Extramural Technology Transfer Administration topic in the Commons online help for help on designating a fiscal month.

Table 7: Utilization Reports

11 Viewing Submitted Documents

TTO Administrators can view all invention disclosures, confirmatory licenses and government support clause documents submitted via the iEdison system. If invention records have been assigned to the TTO User, then the TTO User can see those records. They can also view all submitted invention disclosures for Grantee/Contractor that the TTO Administrator the TTO User account is associated with.

To view a document:

1. Select the **Main Menu** tab to access the *Main Menu* screen.
2. Select the **View Submitted Documents** hyperlink to access the *View Documents* screen.

NOTE: Your search will encompass all documents that you are allowed to view.

For information on each field, please refer to the Glossary of iEdison Screen Fields topic.

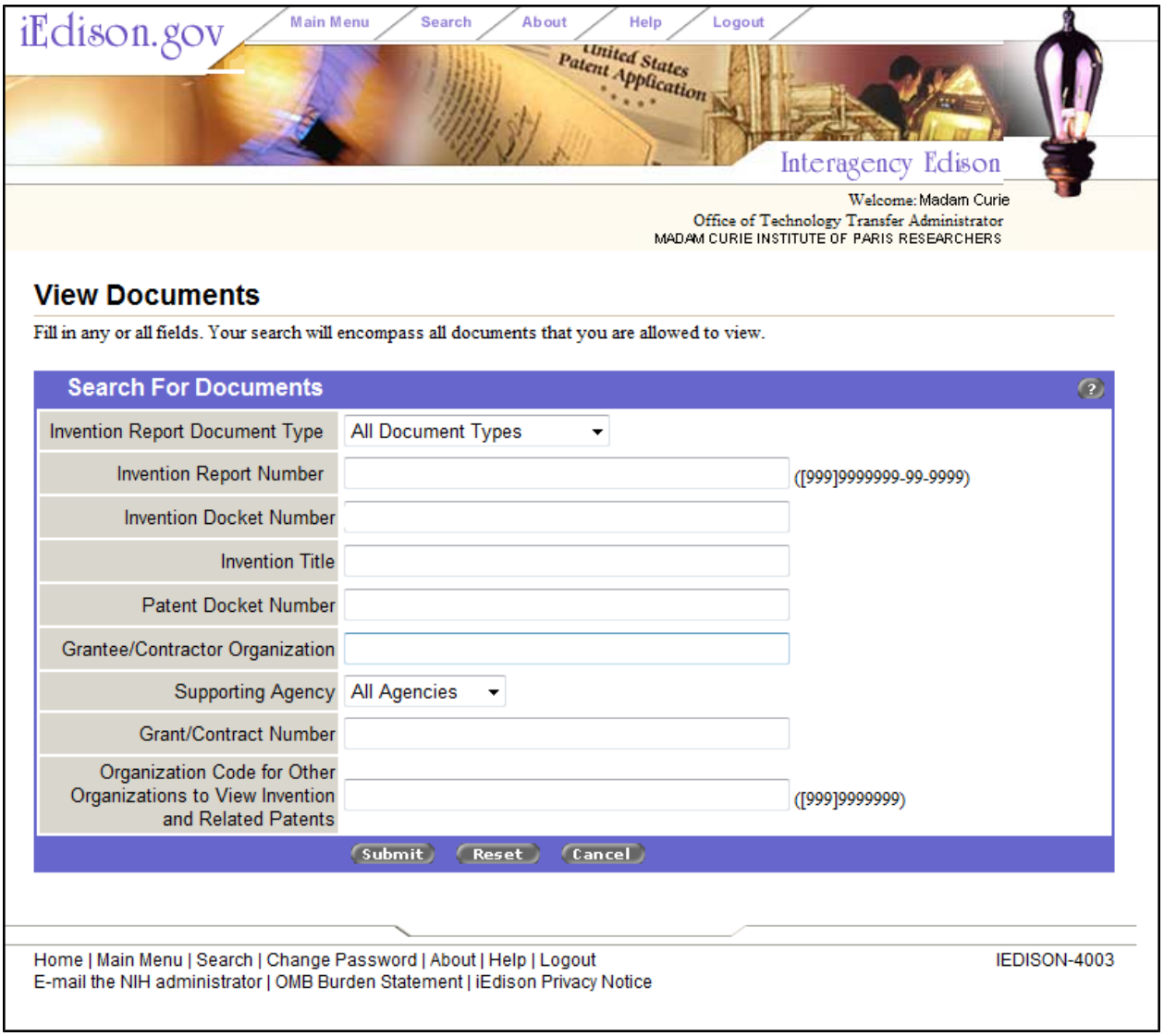


Figure 147: View Documents Screen

3. Enter the following search information:
    a. In the **Invention Report Document Type** field select the appropriate document type.
    b. Enter other desired search criteria.

All search fields are optional. Use any desired combination of fields to perform the search.

4. Perform one of the following options:
    a. Click the **Submit** button to execute the search.
    b. Click the **Reset** button to clear out the search criteria entered or selected.
    c. Click the **Cancel** button to return to the Main Menu screen.

When the **Submit** button is clicked, the system returns the appropriate search criteria results.

Figure 148: View Documents Screen Displaying Search Results

Results are sorted by **Invention Report Number** and then by **Invention Docket Number**. The search results can be sorted by using the sort fields in the *Sort Criteria* section. Clicking the **Submit** button executes the sort.

To move forward or backwards in the search results, the **Page Number**, **Prev**, and/or **Next** hyperlinks can be clicked.

Figure 149: Navigation Search Results Hyperlinks on the View Documents Screen

5. Click one of the following hyperlinks to view that document:
    a. **Confirmatory License**
    b. **Government Support Clause**
    c. **Invention Disclosure**

NOTE: For help viewing PDF or TIFF versions of confirmatory license documents, see Troubleshooting the Viewing of PDF/TIFF Government Support Clause or Confirmatory License Documents.

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12 eMail Notifications

The iEdison system has many built-in email notifications to ensure proper notification of all changes to your submissions. The notifications sent to extramural organizations are sorted alphabetically by message subject and listed below. The *Message Subject* reflects the text that appears as the subject in the email notification.

12.1 Extramural Messages

Here is a list of extramural email notifications/messages and their descriptions:

Message Subject	Description
iEdison Email Address Verification	An email message is generated automatically by the system and sent to the Office of Technology Transfer (TTO) administrator or the inventor, who registers a new iEdison organization, to validate the email address entered on the registration request form.
iEdison Email Address Verification Confirmation	When the TTO administrator or the inventor verifies his or her email address, the system replies to them with a message confirming that validation.
iEdison Invention Report Transferred Notification	When a user has transferred an invention report, the Invention Report Transferred Notification email is automatically generated and sent to the extramural TTO administrators who are assigned to the organization from whom rights are being removed and to the extramural TTO administrators who are assigned to the organization receiving the rights to the invention report being transferred. The email is also sent to the email address specified for iEdison user support.
iEdison Notification of Account Deletion	When an account is deleted, an email message is automatically sent to the account owner from the Commons Account Management System (AMS).
iEdison Notification of Account Modification	When account information has been modified, an email message with the changes is automatically sent to the account owner from the Commons Account Management System (AMS).

Table 8: Extramural Messages

Message Subject	Description
iEdison Notification of Change of Account Type	If an account administrator changes a user's account, either from an administrator to a regular user, or from one type of user within the federal system to another type, an email message is sent automatically from the Commons Account Management System (AMS) to the person whose account was changed.
iEdison Notification of Broken Patent Link	When an organization or inventor modifies a patent report that causes a parent/child patent or invention report relationship to be broken, an email message is sent automatically to all organizations that had been able to view any related patent report.
iEdison Notification of E-mail Address Change	When you change your email address, or when an administrator changes it for you, an email message with the new email address is sent automatically to the new email address from the Commons Account Management System (AMS).
iEdison Notification of Invention Report Reassignment	When an Office of Technology Transfer (TTO) administrator assigns an invention report to someone other than the person who entered the report (the default owner), an email message with details of the newly assigned invention report is sent to the new owner.
iEdison Notification of New Account	When an administrator creates an account, an email message containing the user-name, password, and permissions information is sent automatically to the person whose account has been created. The email message is generated from the Commons Account Management System (AMS).
iEdison Notification of Password Change	When an account administrator resets a user's password, an email message is automatically sent to the user with the new password from the Commons Account Management System (AMS). This randomly generated password must be changed the first time the user logs in.
iEdison Patent Report Transferred Notification	When an organization transfers a patent to another organization, an email message is sent automatically to the extramural TTO administrator at the organization relinquishing the rights and the organization receiving the rights, as well as the iEdison administration office.
iEdison	An email message is sent automatically to the signing authority for an

Table 8: Extramural Messages

Message Subject	Description
Registration Approval and Account Creation	organization that the organization's request for registration has been approved and the organization was registered with iEdison under their signing authority. The email message goes to the person whose name and email address were listed on the registration request as the signatory for the organization.
iEdison Registration Rejection Notification	When the iEdison accounts administrator rejects a registration request, an email message is sent automatically to the TTO administrator or the inventor who submitted the request.
Request for More iEdison Information	The iEdison accounts administrator can send email to the TTO administrator or the inventor requesting more information before processing a registration request.
iEdison Upload Other Document by Agency Users	A notification is sent to extramural institutions when an invention and/or patent other documents are uploaded by agency users.

Table 8: Extramural Messages

12.2 eMail Notifications Text

12.2.1 Email with Username

To: <Taken from TTO Admin or Inventor email address in registration request>

Subject: eRA iEDISON Notification of Authentication Credentials and New iEdison Account

*** This is an automated notification - Please do not reply to this message. ***

<<Prefix>> <<First Name>> <<Last Name>>,

An iEdison has been created for you on <<Date Created>>, by <<Creator>>. Your account details are:

- Account holder: <<First Name>> <<Last Name>>

- Username: <<User Name Submitted>>

- Organization: <<Organization Name>>

- System(s): iEdison

- Role(s): <<iEdison Role>>

Shortly, you will be receiving another email containing your password.

To access the system use the username and password provided in these emails.

If you have any questions about the creation of this account or level of access, contact the person who created the account at: <<Creator's email address>> .

12.2.2 Email with Password

To: <Taken from TTO Admin or Inventor email address in registration request>

Subject: eRA iEDISON: Notification of Password for New Account

*** This is an automated notification - Please do not reply to this message. ***

<<Prefix>> <<First Name>> <<Last Name>>,

The password associated with your recently created account is <<system generated password>>

The above password is temporary. You will be required to change your password the first time you successfully log into the system. On the Change Password page, enter the temporary password in the Current Password field. Please read the instructions on the Change Password page carefully before selecting a new password.

To access the system use the Username provided in the email notifying you of your new account.

12.2.3 Registration Rejection Email

To: <Taken from TTO Admin or Inventor email address in registration request>

Subject: iEdison Registration Rejection Notification

Body:

The Registration Request submitted for <organization name> on <request date time> to the Inter-agency Edison system has been rejected.

For more information, please contact iEdison User Support at edison@od.nih.gov.

12.2.4 Email Address Verification Email

To: <Taken from Extramural TTO Admin or Extramural Inventor email address in registration request>

Subject: iEdison E-mail Address Verification

Body:

The registration request submitted on <request date time> in the Inter-agency Edison system for '<organization name>' has been received. You have been listed as the Extramural Technology Transfer Administrator who will manage accounts for the grantee/contractor organization. In order to proceed with the registration request, we need you to verify your e-mail account by responding to this message.

Please click on the link below to verify your e-mail address for the iEdison Registration Request.

<confirmation hyperlink>

Once the Inter-agency Edison system has verified your e-mail address and an account has been created you will receive a message confirming your username.

Without this response your account will not be created. If you have difficulties or receive errors please contact iEdison User Support at edison@od.nih.gov.

12.2.5 Signatory Copy Approval Email

To: <Taken from Signatory (aka Contact for Person on Fax Form) email address in registration request>

Subject: iEdison Registration for Your Grantee/Contractor Organization

Body:

- The registration request submitted for your grantee/contractor organization, <organization name>, on <request date time> has been approved in the Inter-agency Edison system. You have been listed as the signing authority for this grantee/contractor organization in the registration submission.

Should you have any questions or issues relative to the approval, please contact iEdison User Support as soon as possible at edison@od.nih.gov, (301) 435-1986, or toll-free (866) 504-9552.

12.2.6 Patent Link Broken Notification Email

To: <All Extramural TTO Administrators registered for the related organizations>

Subject: iEdison Notification of Broken Patent Link

Body:

The following patent report was modified by <name> on <patent modification date time> in the Inter-agency Edison system. As a result, one or more parent/child patent report or invention report relationships will be broken.

Should you have any questions or issues relative to this action, please contact iEdison User Support at edison@od.nih.gov, (301) 435-1986, or toll-free (866) 504-9552.

Grantee/Contractor Organization: <Organization Name>

Invention Report Number: <EIR Number>

DOE “S” Number: <DOE “S” Number>

Patent Docket Number: <Patent Docket Number>

12.2.7 Reassign Invention from Account Email

To: <The email address for the account owner>

Subject: iEdison Notification of Re-assignment of Invention based on Account Modification

Body:

<Name>,

Your account on the Inter-agency Edison system was modified on <modification date time> by <administrator name>, an administrator of the iEdison system.

If you have questions, please contact your administrator.

As a result of the modification of your account, you will no longer have access to the following invention reports(s):

Invention Report Number: <EIR>

Invention Docket Number: <Docket Number>

Invention Title: <Title>

12.2.8 Reassign Inventions Email

To: <The email address for the account owner>

Subject: iEdison Notification of Invention Report Reassignment

Body:

<Name>,

Your Inter-agency Edison account, <username>, has been given access to one or more invention reports as of <assignment date time> by <administrator name> an administrator at your

grantee/contractor organization. Details regarding the invention reports you have been given access to are provided below.

If you have questions, please contact your administrator.

Details:

You have been given access to the following invention reports:

Invention Report Number: <EIR Number>

Invention Docket Number: <Docket Number>

Inventors: <Inventors>

12.2.9 Generate Automatic Email Message

To: <All Extramural Inventors, Extramural TTO Administrators and Extramural TTO Users>

Subject: iEdison Extramural Organization Notification Messages

Body:

As of <date>, there are <count> notification messages that apply to <Extramural Org Name>, <Grantee Code>. Please view your notification messages at <URL for iEdison>.

12.2.10 Invention Transferred with Utilization Reports to New Organization Email

To: <Email Address of all Extramural TTO Administrators assigned to the organization from which the invention disclosure was transferred and to which the invention disclosure was transferred. Also, address defined for the NIH iEdison mailbox>

Subject: iEdison Invention Report Transferred Notification

Body:

Invention report number <transferred from eir number> was transferred to a new grantee/contractor organization on <transfer date time>. The new invention report number is <transferred to eir number>.

Utilization reports associated with this invention were transferred as well.

Following are the details of the transfer.

TRANSFERRED FROM GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Contractor Organization: < Transferred From Organization Name>

TTO Address: < Transferred From Organization TTO Address>

TTO Phone: < Transferred From Organization TTO Phone >

TTO Fax: < Transferred From Organization TTO Fax >

TRANSFERRED TO GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Organization: < Transferred To Organization Name>

TTO Address: < Transferred To Organization TTO Address>

TTO Phone: < Transferred To Organization TTO Phone >

TTO Fax: < Transferred To Organization TTO Fax >

Should you have any questions or issues relative to this action, please contact iEdison User Support at edison@od.nih.gov, (301) 435-1986, or toll-free (866) 504-9552.

12.2.11 Invention Transferred without Transfer of Utilization Reports to New Organization Email

To: <Email Address of all Extramural TTO Administrators assigned to the organization from which the invention disclosure was transferred and to which the invention disclosure was transferred. Also, address defined for the NIH iEdison mailbox>

Subject: iEdison Invention Report Transferred Notification

Body:

Invention report number <transferred from eir number> was transferred to a new grantee/contractor organization on <transfer date time>. The new invention report number is <transferred to eir number>.

Following are the details of the transfer.

TRANSFERRED FROM GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Contractor Organization: < Transferred From Organization Name>

TTO Address: < Transferred From Organization TTO Address>

TTO Phone: < Transferred From Organization TTO Phone >

TTO Fax: < Transferred From Organization TTO Fax >

TRANSFERRED TO GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Organization: < Transferred To Organization Name>

TTO Address: < Transferred To Organization TTO Address>

TTO Phone: < Transferred To Organization TTO Phone >

TTO Fax: < Transferred To Organization TTO Fax >

Should you have any questions or issues relative to this action, please contact iEdison User Support at edison@od.nih.gov, (301) 435-1986, or toll-free (866) 504-9552.

12.2.12 Patent Transferred to New Organization Email

To: <Email Address of all Extramural TTO Administrators assigned to the organization from which the patent filing was transferred and to which the patent filing was transferred. Also, address defined for the NIH iEdison mailbox>

Subject: iEdison Patent Report Transferred Notification

Body:

Patent report <transferred from patent docket number> associated with <transferred from eir number> was transferred to a new grantee/contractor organization on <transfer date time>. The new patent docket number is <transferred to patent docket number> and the patent report is now associated with invention report number <transferred to eir number>.

Following are the details of the transfer.

TRANSFERRED FROM GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Contractor Organization: < Transferred From Organization Name>

TTO Address: < Transferred From Organization TTO Address>

TTO Phone: < Transferred From Organization TTO Phone >

TTO Fax: < Transferred From Organization TTO Fax >

TRANSFERRED TO GRANTEE/CONTRACTOR ORGANIZATION:

Grantee/Contractor Organization: < Transferred To Organization Name>

TTO Address: < Transferred To Organization TTO Address>

TTO Phone: < Transferred To Organization TTO Phone >

TTO Fax: < Transferred To Organization TTO Fax >

Should you have any questions or issues relative to this action, please contact iEdison User Support at edison@od.nih.gov, (301) 435-1986, or toll-free (866) 504-9552.

13 Glossary of iEdison Screen Fields

Listed below in alphabetical order is a glossary of iEdison screen fields.

Field Name	Description
Agency Designation	• Each Invention Report in the iEdison system must have a designated primary agency. • For Agency Designations see *Awarding Federal Agency* section below.
Awarding Federal Agency	• The federal government agency that made an award that was used to support the conception of the invention or its first actual reduction to practice. • Select the acronym of the Awarding Federal Agency the list (see below for details). • **AFRL/RI** - Air Force Research Laboratory/Rome Institute (Information Directorate) • **AHRQ** - Agency for Healthcare Research and Quality • **Army/ARL** - United States Army Research Laboratory • **Army/ARO** - United States Army Research Office • **Army/MRMC** - United States Army Medical Research and Materiel Command • **Army/SMDC** - United States Army Space & Missile Defense Command • **Army/SSC** - United States Army Soldier Systems Center • **ATSDR** - Agency for Toxic Substances and Disease Registry • **CDC** - Centers for Disease Control and Prevention • **DHS/ST** - Department of Homeland Security/? • **DOC/EDA** - Department of Commerce/Economic Development Administration • **DOC/ITA** - Department of Commerce/International Trade Administration • **DOD/DARPA** - Department of Defense/Defense Advanced

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	Research Projects Agency • **DOD/DMEA** - Department of Defense/Defense Microelectronics Activity • **DOD/DTRA** - Department of Defense/Defense Threat Reduction Agency • **DOE** - Department of Energy • **DOT** - Department of Transportation • **EPA** - Environmental Protection Agency • **FDA** - Food and Drug Administration • **IHS** - Indian Health Service • **Navy/ONR** - United States Navy Office of Naval Research • **NIH** - National Institutes of Health • **NOAA** - National Oceanic and Atmospheric Administration • **NRC** - National Research Council • **NSF** - National Science Foundation • **USAF/AFOSR** - United States Air Force/Air Force Office of Scientific Research • **USAF/ESC** - United States Air Force/Electronic Systems Center • **USAID** - United States Agency for International Development • **USDA/ARS** - United States Department of Agriculture/Agricultural Research Service • **USDA/FS** - United States Department of Agriculture/Forest Service • **USDA/NIFA** - United States Department of Agriculture/National Institute of Food and Agriculture
Commercial Name of Product	• The name of the product that was developed.
Current Invention Disclosure	• The most recent invention disclosure document associated with an invention report.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	• The current invention disclosure field is after has been uploaded. • Once an invention disclosure is uploaded, the **View Current Document** hyperlink is used to access the uploaded document.
Date of First Publication, On Sale, or Public Use (mm/dd/yyyy)	• The date of first publication, on sale, or public use initiates the one year statutory period wherein valid patent protection can still be obtained in the United States. • Based on this date, known as the bar date, the grantee or contractor has a one-year statutory period to file a patent application in the United States. • Such a disclosure may take the form of public presentation, on sale (offer for sale), or use. • The format for this field is mm/dd/yyyy.

Explanatory Notes	• Explanatory notes may be used to note information about an Invention Report or Patent Report. Explanatory notes should not be used for data that is provided by other iEdison data fields.
	• **NOTE:** No notification is sent to the Primary Agency when an explanatory note is added to an Invention Report or Patent Report. As such it is not intended to be a means of bringing an issue to the attention of an Agency. It is not a substitute for notification by proper means such as a letter, e-mail or telephone call.
	• Explanatory notes could be used for:
	  ◦ To indicate a joint invention with inventors from two or more organizations.
	  ◦ Federal agencies to indicate that when an invention report has been transferred to another reporting new organization.
	• **NOTE:**The **Explanatory Notes** section is no longer editable on the *Modify Invention Record* screen or the *Modify Patent Record* screen when the Invention Report's or the Patent Report's status is changed to *Waived*.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
Filing Date of the Non-Provisional Patent Application (mm/dd/yyyy)	• This field is used for either the filing date of the non-provisional patent application with the U.S. Patent and Trademark Office (USPTO) or to indicate the date of the U.S. national stage commencement for a patent filing derived from a PCT filing. • An *Elect Title* must be entered in the Invention Report before for the **Non-Provisional Patent Application Number** or the **Filing Date of the Non-Provisional Patent Application** fields can be entered. • The format for this field is mm/dd/yyyy.
Filing Date of the PCT Patent Application (mm/dd/yyyy	• This field is used for the filing date of the Patent Cooperation Treaty (PCT) application provided by the World Intellectual Property Organization (WIPO). • The format for this field is mm/dd/yyyy.
Filing Date of the Provisional Patent Application (mm/dd/yyyy)	• This field is used for the filing date of the U.S. provisional patent application with the USPTO. • The format for this field is mm/dd/yyyy and cannot be before June 8, 1995.
Funding Agreements Agency Designation and associated Grant/Contract Number	• **Funding Agreements** - The funding agreement is identified and reported in two parts, the Agency Designation (the acronym for the Federal Agency name) and the grant or contract award number corresponding to that Agency that contributed to the invention. • The main screen allows entry of the first funding agreement. Additional funding agreements may be added using the **Add Grant/Contract Numbers** button. • **Agency Designation** - For Agency Designations see the **Agency Office Contacts** hyperlink at the iEdison *Home* screen. • **Grant/Contract Number** - For each supporting agency, provide the corresponding grant or contract number. The format of the grant or contract number is specified by the associated agency. The

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	iEdison system enforces the grant or contract number format for each participating iEdison agency. For more information, please refer to the Grant and Contract Number Formats topic. • Up to 12 funding agreements to be associated with each Invention Report.
Funding Agreement Number	• This field in the registration form requests that the federal funding agreement number be composed of the federal agency code and the grant or contract number for a supporting agency. • **It is used during the initial iEdison registration and not for invention reporting.**
Grant/Contract Number	• See **Funding Agreements Agency Designation Grant/Contract Number** field description.
Grantee/Contractor Organization	• The name of the organization established at registration. • It is auto populated on the *Invention Report* and *Patent Report* screens from the organization registration and is not editable.
Grantee/Contractor Organization Name	• The official name of the Grantee or Contractor Organization responsible for compliance with the provisions of the Patent Rights Clause and related terms and conditions in the Funding Agreement. • It appears on the *Request to Register Organization* screen.
Grantee/Contractor Organization Code	• The unique code is assigned to the reporting organizations. • This code is the same as the Institutional Profile File number in the eRA Commons if that Institution receives NIH Grants or Agreements. • **NOTE:** Some organizations in Edison that have more than one business unit registered in era Commons to receive Grant Awards (e.g., university systems with multiple campuses or a system office) may have only certain business units using edison for

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	invention and patent reporting on behalf of other units. • For information about the Institutional Profile File number, please refer to the Institutional Profile File topic in the Commons online help.
Invention Disclosure Document Type	• iEdison allows the electronic submission of the Invention Disclosure document containing the written description of the invention, a signed copy of the government confirmatory license, and the government support clause which is in a patent or patent application. • Any of these documents may be submitted through the iEdison interface as either a PDF or TIFF document type. • Alternatively, the user may submit plain ASCII text by inserting it in the text box provided. • The invention disclosure document type is used to indicate the type of document submitted. • **NOTE:** Only documents submitted as PDF, TIFF, or ASCII text will be able to be viewed. Select the appropriate document type from the list. • **PDF** - Indicates a PDF version will be uploaded. • **TIFF** - Indicates a TIFF version will be uploaded. • **Text** - Indicates an ASCII text version is entered in the **Invention Disclosure Text** field.
Invention Docket Number	• The **Invention Docket Number** field is for an internal reference number of the grantee/contractor organization to help track a reported invention(s). • Any combination of numbers and letters may be used for an Invention Docket Number. • If no Invention Docket Number is entered when an Invention Report is created, the system adds the last 6 digits of the **Invention Report Number**, as the **Invention Docket Number**.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description

	• The **Invention Docket Number** can be modified.
	• **Examples:**
	  ◦ Invention Report Number (EIR) 7654321-14-0001:
	  ◦ Invention Docket Number: 140001

Invention Disclosure File Location	• The iEdison system allows grantee or contractor organizations to submit the written description of the invention. know as the Invention Disclosure, electronically as a PDF, TIFF, or Text file. • The **Invention Disclosure File Location** field enables the iEdison user to specify the location of the Invention Disclosure to be uploaded. • The path and file name may be entered directly into the field or selected using the **Browse** button.
Invention Disclosure Text	• The **Invention Disclosure Text** field can be used for written description of the invention when the document type equals Text. There is a maximum of 20 pages.
Invention Keyword (s)	• The **Invention Keyword** field is optional. • This field enables the grantee/contractor organization to designate key terms for searching for Invention Reports. • Up to 12 keywords (maximum 30 characters each) can be added in each Invention Report.
Invention Report Date	• The **Invention Report Date** is the date that the invention was disclosed to the government. The format for this field is mm/dd/yyyy. • This date should not exceed 2 months from the date the institution learned of an invention 37 CFR 401.14 (c)(1).
Extramural Invention Report Number (This number will	• The **Extramural Invention Report Number** is automatically generated by the iEdison system for a new Invention Report after data has been submitted, checked for errors, and verified.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
automatically be generated by the iEdison system.)	• The **Extramural Invention Report Number** is unique for each reported invention and cannot be duplicated or reused. • The **Extramural Invention Report Number** cannot be modified. • Refer to the **Extramural Invention Report Number** in any correspondence.
Invention Status	• The **Invention Status** reflects the current status of the title to rights in the reported invention. • Invention Report statuses that (name of roles) can select are: ◦ *Under Evaluation (Initial State)* ◦ *Elect Title* ◦ *Licensed as an Unpatented Biological Material or Research Tool (If allowed by the Primary Agency for EIR)* ◦ *Not Elect Title - Waive to Government* ◦ *Not Elect Title - Waive to Inventor* ◦ *Not Elect Title - Waive to Third Party*
Invention Title	• The **Invention Title** is the title of the invention as it appears in the Grantee/Contractors employee's Invention Report. • Invention Titles can be modified.
Inventor(s) **First Name** **Middle Name** **Last Name**	• The **Inventor** field(s) in the Invention Report and the **Inventor(s)** field in the Patent Report each has three parts to add the full name of each inventor in an Invention Report and any associated Patent Report with the patent filing. • The **Inventor** field can be modified to add inventors or to exclude inventors that were not included in an associated patent application. • Up to 12 inventors can be added to an Invention Report or in a Patent Report.
Latest stage of development of any	• The stage that the product is in.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
product	• The following values apply: ◦ *Commercialized* - The invention is being used in any capacity commercially (e.g., drug screening, quality control, in manufacturing) and/or is a product on the market. ◦ *Licensed* - The invention is under license or option to one or more companies. ◦ *Not Licensed* - The invention is not under any license or option.
Name of Third Party to Which Title is Waived	• In an Invention Report or Patent Report, this field identifies the name of a proposed third party the nonprofit grantee/contractor wants to assign rights to and that would assume the invention patent rights and reporting obligations if the waiver is approved.
Non-Provisional Patent Application Number	• The **Non-provisional Patent Application Number** field is for the non-provisional patent application. • The Invention Status selected must be *Elect Title* before a **Non-Provisional Patent Application Number** can be added. • USPTO is up to 13 for utility patent applications, 29 for design, and 61 for provisional. • Unlike the provisional patent application, the non-provisional patent application contains information that is examined and serves as the basis for which the terms of patent protection are measured. • The filing and reporting of a non-provisional patent application does fulfill requirements in 37 CFR 401.14 (c)(3) and (f)(6) for submission of an initial patent application within one year of election of title.
Not Elect Title Other Reason	• If the Invention Report status or Patent Status selected is *Not Elect Title* and the Not Elect Title Reason selected is *Other*, this field is for a clear description of the other reason for not electing title. • The size limit is 4 kilo bytes.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
Not Elect Title Reason	• This field is for the grantee/contractor to select the reason for choosing to *Not Elect Title* or retain Title in an Invention Report. • In the Invention Report the following values can be selected: ◦ *Low Commercial Potential* ◦ *Non-Patentable (Not Novel)* ◦ *Non-Patentable (Not Useful)* ◦ *Non-Patentable (Obvious)* ◦ *Other*
One Year Extension to File Initial Patent Application	• According to 37CFR Section 401.14(c.3) the grantee/contractor may request an extension of time to the one year period to file an initial patent application. • iEdison permits the requesting of a one year extension: ◦ **No** - Indicates no extension is requested (default). ◦ **Yes** - Indicates a one-year extension is requested
Organization Code for Other Organizations to View Invention and Related Patents	• A maximum of three additional iEdison registered organizations may be granted view-only access to an Invention Report. • Add the grantee code of the other grantee/contractor in this field. • For information about searching for an Institutional Profile File number, please refer to the Institutional Profile File topic in the Commons online help.
Organization DUNS	• The Data Universal Numbering System (DUNS) number provided by Dun & Bradstreet that identifies the grantee/contractor. • Entry of a DUNS number is required for new registration submissions as of January 31, 2014 and must pass a system validation check. • For an individual person, a DUNS number is not required. • iEdison system displays the primary DUNS number if the institution has multiple DUNS numbers.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
Parent Invention Report Number	• The **Parent Invention Report Number** is used when an invention is combined into another invention. • Enter the **Parent Invention Report Number**. For information on patent report number formats, please refer to the Patent Number Formats topic. • Alternatively, new intellectual property, i.e. a second invention could contribute to form a CIP derivative patent application. • Under such circumstances, one invention must be designated the parent. • The parent invention is defined as the invention through which all associated patents and utilization data, if required, are reported. • Secondary inventions that contribute to such patents are defined in this relationship as Child inventions. • Child inventions are not able to have associated patents.
Patent Docket Number	• The **Patent Docket Number** field is for an internal reference number of the grantee/contractor organization to help track a reported patent(s). • The field can be used for a unique identifier designated by the organization to help track a reported Patent record internally. • Any combination of numbers and letters may be used for the **Patent Docket Number**. • If no Patent docket number is provided, the iEdison system creates on using the last 6 digits of the **Invention Report Number** followed by a hyphen and a 2 digit serial number, as the **Patent Docket Number**. • The **Patent Docket Number** can be modified by the User.
Patent Issue Date (mm/dd/yyyy)	• This field is used for the patent issue date located on the upper right-hand corner of the issued US patent. • The format for this field is mm/dd/yyyy.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
Patent Number	• The **Patent Number** uniquely identifies the patent issued by the U.S. Patent and Trademark Office. • The **Patent Number** is located in the patent document. • Required when a date is entered in any one of the Patent date fields. • See Help with Formats - Patent Number for valid **Patent Number** formats.

Patent Status	• In the Patent Report form, select one of the following patent statuses:
	  ◦ *Institution Retains Rights*
	  ◦ *Waive to Government*
	  ◦ *Assign to Inventor(s)*
	  ◦ *Assign to Third Party*

PCT Patent Application Number (PCT/AA##/#####)	• The **PCT Patent Application Number** (Patent Cooperation Treaty) is used to uniquely identify a PCT type patent application. • The format for this field is 2 letters (country code) + 2 or 4 digit year + / + 5 to 6 digits. The number is saved in the database as: PCT/AA####/######. If only 5 digits are provided at the end of the number, the system adds a leading 0. • The PCT application has the effect of a national patent application in those PCT contracting states designated in the application when pursued at the national stage. • An example of a PCT application number is PCT/US1995/012345.
Primary Agency	• A Primary Agency must be designated for each Invention Report in the iEdison. Select the Primary Agency acronym from this list. • **NOTE:** Selecting *Other* as the Primary Agency, while included in the list, is not a valid designation.

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
Provisional Patent Application Number	• The **Provisional Patent Application Number** is the unique identifier a provisional patent application created upon filing at the USPTO. • The format for this field is 60, 61 or 62/###,###.
Reporting Year	• In the Utilization Report, the **Reporting Year** is the year for which each utilization report being submitted. • This year must be entered to generate the Utilization Report Form.
Research Tools Guidelines Agreement Accepted	• The government considers the sharing of unique research resources to be an important way to enhance the value of government-sponsored research. Sharing research tools is standard term and condition of NIH awards. • Grantee or contractors should be aware of such terms and conditions. • The **Research Tools Guidelines Agreement Accepted** field indicates whether the sharing of research tools has been agreed to in principle by the grantee or contractor organization for the associated invention. • This indicator is applicable only when the invention status is set to *Licensed as an Unpatented Biological Material or Research Tool*. • This indicator also applies to these agencies: NIH, USDA/FS, USDA/ARS, and USDA/NIFA. • Please refer to this policy web site for more information.
Subcontract Information	• The Bayh-Dole Act provides for flow down of invention rights. • The subcontractor may retain rights, but is obligated to comply with reporting requirements to the same extent as the grantee or contractor organization. • iEdison allows reporting of subcontractor inventions directly. • In addition to the subcontract number to identify the subcontractor, iEdison allows the subcontractor to identify the prime contractor:

Table 9: Glossary of iEdison Screen Fields

Field Name	Description

	name, city, state and country.
	• This information lets the government track the flow down provisions of the law.
	• The iEdison system allows up to four subcontracts to be associated with an invention.
	• Subcontractor information can be added using the **Add/Edit Subcontracts** button the *Create New* or *Modify Invention Report* screen. The following fields appear on the *Add/Edit Subcontractor Details* screen.
	  ◦ **Subcontract Number -**
	  ◦ **Prime Contractor Name**
	  ◦ **Prime Contractor City**
	  ◦ **Prime Contractor State**
	  ◦ **Prime Contractor Country**
	  ◦ **Prime Contractor DUNS -** Enter the nine-digit number Data Universal Numbering System (DUNS) number provided by Dun & Bradstreet that uniquely identifies the grantee/contractor.

Title Election Date (mm/dd/yyyy)	• The **Title Election Date** is the legally binding date that the grantee/contractor elected to retain title to an invention. • The date is not editable. • This date begins the one-year period during which the initia patent application must be filed if a one year extension has not been requested. • The format for this field is mm/dd/yyyy.
Title Extension Years	• The number of **Title Extension Years** indicates the additional time after the default of two years for which an extension to elect title has been requested. • The following values may be selected:

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	◦ 0 - Indicates no extension is requested ◦ 1 - Indicates a one-year extension is requested ◦ 2 - Indicates a two-year extension is requested • Extension of time to elect title is discussed at 37CFR Part 401 (Sec. 401.14(c.) 2) and (Sec. 401.14(c.) 4)
TTO Address TTO Address Line 2 TTO Address Line 3 TTO Address Line 4	• Enter the address of the Office of Technology Transfer or equivalent at the Extramural Organization. • The address has four lines for the street address lines, city, state, zip, and country.
TTO Fax	• Enter the fax number of the Technology Transfer Office or equivalent at the grantee/contractor. • The format of this fax number field is: (123) 456-7890 in countries using the North American Numbering Plan, including the U.S., Canada, and most of the Caribbean. • For other countries use the country code, followed by the city code and number (e.g., +44 023422).
TTO Phone	• Enter the phone number of the Technology Transfer Office or equivalent at the grantee/contractor. • The format of this field is: (123) 456-7890 in countries using the North American Numbering Plan, including the U.S., Canada, and most of the Caribbean. • Other countries use the country code, followed by the city code and number (e.g., +44 023422).
Upload Other Document	• Up to 20 other documents may be uploaded in either an Invention Report or a Patent Report. The size of each document is limited to 25 MB. • Documents uploaded in this field must not be Invention Disclosures, Confirmatory Licenses, or Government Support

Table 9: Glossary of iEdison Screen Fields

Field Name	Description
	Clauses. • Once uploaded a document cannot be deleted by the Inventor role. The TTO Administrator and TTO User role can delete an uploaded document.
U.S. Patent Title	• In the Patent Report the **U.S. Patent Title** field is for the exact title of the U.S. patent or patent application as submitted by the Institution to iEdison or to the USPTO. • The **U.S. Patent Title** field is automatically populated when the confirmatory license is generated. For more information, please refer to the Generate and Submit a Confirmatory License topic. • If the title has changed during prosecution of the patent, the **U.S. Patent Title** field **must** should be modified. • Both upper and lower case letters can be used in the field.

Table 9: Glossary of iEdison Screen Fields