

Guide to Completing an Intellectual Property Disclosure Form



If you have any questions about how to complete an invention disclosure, please contact Tommy Martindale (Director, Technology Transfer) at tmartindale@sdsu.edu

Please note:

- SDSU faculty and staff, and students involved in research are required to promptly disclose potentially patentable inventions conceived, reduced to practice, or developed while employed or enrolled at the SDSU pursuant to Senate Policy on Patents, Section 8.12
- It is important to initiate the invention disclosure process prior to publication, presentation, or demonstration to the public, as public disclosures can act as a bar to patent rights.

Getting started: How to request/create a new Inteum disclosure portal account

Please access the disclosure portal here: <https://sdsu.inteum.com/sdsu/inventorportal/login.aspx>

If you are a first-time user, please fill out the Form (link above; screenshot below) to create an account to establish your log-in credentials.

Create Account

Please note that all fields marked with an asterisk (*) are required.

User Name: *

Gender: * First Name: * Middle Name: * Last Name: *

Prefix: * Suffix: * Citizenship: *

Title: * Main Department: * Additional Departments: * Specialty: *

Email Address: * Type: * Remove

☒ Set as default email

Add another Email

Phone Number: * Type: * Remove

☒ Set as default Phone Number

Add another Phone Number

Address: * Type: * Remove

City: * State / Prov: * Postal Code: *

Country: *

☒ Set as default Address

Add another Address

Create an Account

Once you've logged in, you can begin a new disclosure.

Disclosing an invention or creative work:

(A) Access this link: <https://research.sdsu.edu/tto>

On the left-hand side column, click on the heading: "Disclose an Invention or Creative Work."

SDSU | San Diego State University

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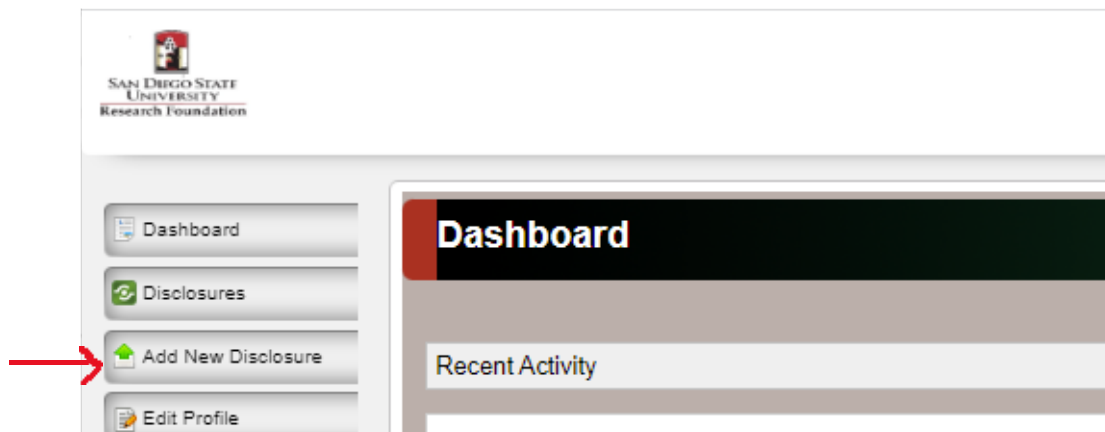
The TTO is here to help SDSU faculty. What can the TTO do for you?

The TTO provides a variety of services for the faculty and University community to further its mission of commercializing research to benefit the public. These services can be divided into four different categories: intellectual property management and education, commercialization support, agreement negotiation and maintenance, and administrative assistance. At the TTO, service to SDSU faculty and researchers is its top priority.

IP Education and Management

- Protecting Intellectual Property
- Managing the Patent Prosecution Process
- Receiving and Distributing Revenues

- (B) **Log in.** The following screen will open.
- (C) **Click on “Add New Disclosure”** in the left-hand side menu.



This will open the window below.

- (D) **Fill in the details regarding your new disclosure.**

Add the title of your technology (“Disclosure Title”).

From the drop-down menu, choose the Type of Disclosure (Copyrightable Work or Invention or Software).

Click on “Create New Disclosure.”

The image shows a web form titled 'New Disclosure'. At the top, a message states: 'You are creating a new disclosure. Before you can edit your disclosure, you must first enter a title and choose the type of disclosure.' Below this message is a text input field labeled 'Disclosure Title:'. Underneath the text field is a dropdown menu labeled 'Choose the Type of Disclosure:'. The dropdown menu is open, showing three options: 'Copyrightable Work', 'Invention', and 'Software'. At the bottom of the form are two buttons: 'Create New Disclosure' and 'Cancel'.

Depending upon which you select (Copyrightable Work or Invention or Software), the respective Disclosure Form will open.

(E) Complete and submit the Disclosure Form

Below is an example of the “Invention” disclosure form, with the fields that are required to be filled out before the form can be submitted marked with an asterisk.

Type of Disclosure: Invention

The screenshot shows a web form titled "Disclosure". At the top, there are three buttons: "Save As Draft", "Download As PDF", and "Download As Word". Below these buttons, the form is divided into several sections. On the left, there is a "Disclosure Type:" dropdown menu with "Invention" selected, indicated by a red arrow. Below this is a "Status:" text input field. Further down is an "Invention Id:" text input field. On the right side, there is a "Disclosure Title:" text input field, which is circled in red. Below this is a "Tech Id:" text input field.

(1) Disclosure Title* - Add the title of your technology.

The “Status,” “Invention ID” and “Tech ID” fields are not clickable.

Invention Disclosure

- (2) Technical Description** – Describe the scope and details regarding your invention.
- (3) Institutional Support*** – Provide the details of any institutional support relied upon to develop your invention or creative work. Generally, this includes the use of equipment, supplies, facilities, employee time, State Funds, Auxiliary Funds, external funding administered by either the State or an Auxiliary and any other institutional resources. Some examples of institutional support include assigned time for research, release time, graduate assistants, purchase of equipment used solely for this creation, ITS support for the development of a technology or creative work, and other similar support. Use of campus photographic services, use of recording studios, or specially purchased materials would also be relevant in the case of creative works.
- (4) Non-obviousness** – State why might your invention (when it was conceived) not have been obvious to people reasonably skilled in the field or anticipated from the totality of previous knowledge.
- (5) Stage of Development*** - Provide information on the extent to which your invention has been realized in practice, whether you are working toward a prototype or demonstration of principle.
- (6) Expert opinions** – Mention the names of experts familiar with the field and the commercial potential of the invention, but unrelated to the inventor(s) and can give confidential opinion on the invention

(7) Non-Technical Description – Include description of invention to intelligent people not in your field.

(8) Public disclosure

The date of public disclosure is critical as a U.S. patent application should be filed prior to the invention being disclosed to the public. While a one-year grace period exists before an inventor's own public disclosure bars them from obtaining a patent in the United States, SDSU loses the ability to apply for a patent in most countries outside of the United States once a public disclosure occurs. Notifying the TTO of the timeline for a forthcoming public disclosure is very important in order to avoid a loss of rights.

Use the drop-down menu to indicate whether your invention has been disclosed (e.g., as abstract, paper, article, talk, news story, thesis defense, dissertation, or campus seminars that are open to public, public conversation).

(9) Public Disclosure Date - If your invention has been publicly disclosed, enter the date of the first public disclosure.

(10) Public Disclosure Type - The modes of public disclosures can include in-person, in print and/or online (e.g., details on the symposium, conference, *etc.*, where the work was presented).

(11) Future Publication - Use the drop-down menu to note whether a publication or other disclosure is planned in the next six months

(12) Future Publication - Provide the type of publication (e.g., details on the symposium, conference, *etc.*, where the work is expected to be presented), and estimated date of disclosure. In general, papers, abstracts, and presentations that are submitted and under confidential review are not public disclosures. However, you should ask for clarification on confidentiality from the journal to which you are submitting your publication.

(13) Future Publication date - If the invention has not yet been publicly disclosed, enter the expected date of public disclosure (if known).

(14) Existing patents – Use the drop-down menu to indicate if you are aware of any patents similar to your invention.

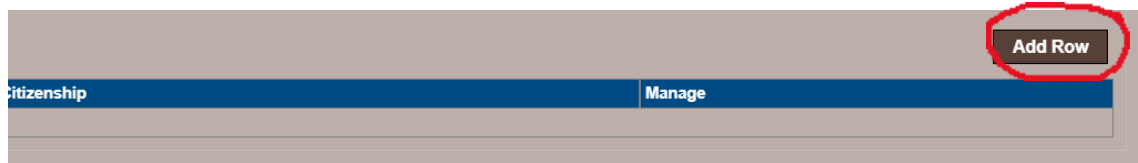
(15) If Yes, Citations - Provide citations & enclose copies of relevant publications or patents, if possible.

(16 -20) Sale of Invention – Use the drop-down menu to note if either you sold or offered for sale any products that embody your invention or allowed others outside the University to sell your invention, and the description, date, and reason for sale (if applicable).

(21) SDSU Technology Transfer Office publication of "non-enabling abstract" - Use the drop-down menu to choose whether non-enabling abstract can be publicized among new inventions that are available to license.

(22) Inventor Citizenship* - Please scroll to the extreme right of this section to find and click on the "Add Row" button. Add as many rows as necessary. This field is required simply because patent applicants are

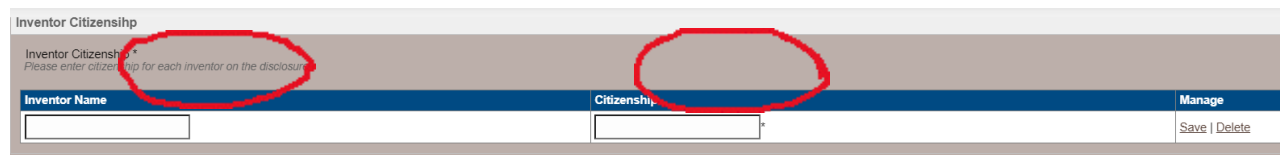
required to report the citizenship of each named inventor to the United States Patent Office when filing for patent protection.



Citizenship	Manage
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Add Row

Fill in the inventor(s)' name(s) and citizenship details. Manage the individual entries using the "Save/Delete" button.

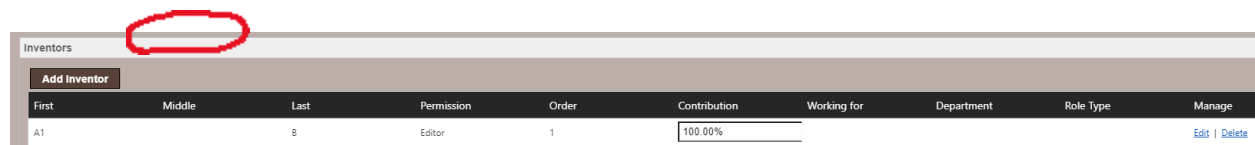


Inventor Citizenship

Please enter citizenship for each inventor on the disclosure.

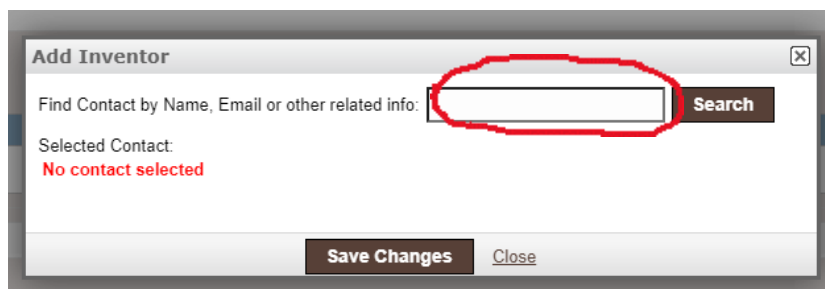
Inventor Name	Citizenship	Manage
<input type="text"/>	<input type="text"/>	Save Delete

(23) Inventors - Click on the "Add Inventor" button to add details.



Inventors									
Add Inventor									
First	Middle	Last	Permission	Order	Contribution	Working for	Department	Role Type	Manage
A1		B	Editor	1	100.00%				Edit Delete

The window below will open. Type in the name of the inventor and click "Search."



Add Inventor

Find Contact by Name, Email or other related info: **Search**

Selected Contact:
No contact selected

Save Changes [Close](#)

Choose the search result and then save changes. In the absence of any search results, click on "Add a new Contact."

Add Inventor

Find Contact by Name, Email or other related info: **Search**

Search Results:

Choose

[Add a new Contact](#) if you cannot find the Contact you are looking for.

Selected Contact:
No contact selected

Save Changes [Close](#)

Repeat the steps to add all inventors (include yourself if you are an inventor) and also inventors not affiliated with SDSU.

Edit/Manage the individual entries using the “Edit/Delete” button.

Contribution - If all inventors agree that they did not contribute equally to the development of the invention and that any resulting revenues should not be evenly distributed, please indicate the agreed upon “% contribution” for each inventor.

The sum total of the % contributions of all the inventors must not exceed 100%.

Edit Inventor

Selected Contact:

Working For: **...**

Client/Dept: **...**

Inventor's Disclosure Permissions/Access: *

☒ Editor
Can add, edit or delete this disclosure in draft.

Role Type:

Order: *

Contribution % *

Save Changes [Close](#)

(24) Remarks – Add any remarks in the box provided in the form.



Remarks

By	Comment	Created
No remarks to display.		

Add a Remark

Save Remark

(25) Funding – SDSURF has obligations to research sponsors to report and fully disclose intellectual property that results from sponsored projects. Therefore, it is important that any related funding information is logged to enable SDSURF to comply with relevant contractual obligations and government regulations.

If external funding was used, please provide the sponsor’s name, country, contract number, and any contact information that is available.

In the Invention Disclosure Form, click on “Add Grants.”

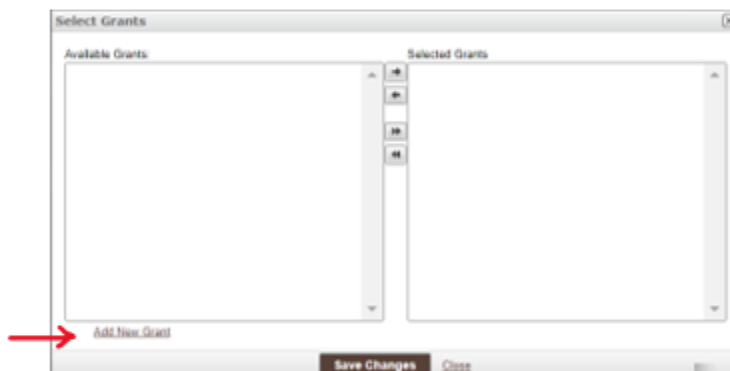


Funding

Add Grants

Title	Grant Number	Internal ID	Granted Date	Sponsors
No Grants Found				

If necessary, create a new entry by clicking on “Add new grant.”



Select Grants

Available Grants

Selected Grants

Add New Grant

Save Changes Close

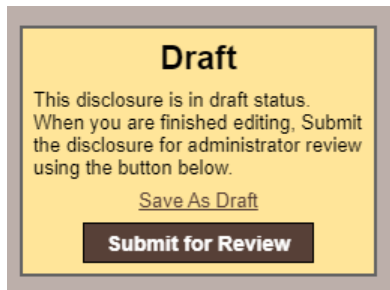
Fill in the details; especially the Title, Grant Number and Granted Date. Save the changes.

(26) Documents - IMPORTANT, take advantage of the ability to upload one or more documents that you can share regarding your technology. These can include patents, conference posters, abstracts, drafts, preprints, publications, *etc.* In many cases, you can upload a detailed written description of your invention that may already exist in the form of a draft manuscript, and then make reference to the uploaded document or manuscript in a variety of the disclosure fields to save time.

(27 – 30) Subscribers, Interests, Marketing Targets, Patents – Add the details as applicable.

(31) Menu bar at the bottom of the disclosure form - Click on “Save As Draft” to complete the disclosure at a later date or “Submit for Review” by the TTO.

Alternatively, click on the “Submit for Review” button in the top right hand side of the Disclosure Form once you have completed the form.



The draft cannot be modified by you once you submit it; however, please contact the TTO (tmartindale@sdsu.edu) should you wish to make any modifications post-submission.