JHURA Intake Form Quick Guide

**What documents require using the intake form?**
- Any contract with incoming funding to JHU requiring review and institutional signature
- All unfunded agreements (i.e., agreements that do not have any exchange of funding)
- Any award document without an existing, approved Coeus record
- Any award modification or amendment (contract or grant), that requires an update to the award record whether or not there is funding related (i.e., NCE, deobligation, PI change, terms changes), whether or not institutional signature is required.

**What documents do not require using the intake form?**
- Material Transfer Agreements - For Public Health, submit only the MTA Request Form using the form. All other MTAs should be sent to JHTV.
- Notice of Grant Awards and foundation awards that come directly to the JHURA central email (jhra@jhu.edu) address (i.e., NIH, NSF, Gates, etc.)*
- Proposal documents
- Prior approval requests
- Reports that need institutional signatures
- Pending items that do not need JHURA review/drafting yet
- Outgoing subawards (use the Subawards Checklist System)

*NOTE: Any grant award sent directly to the PI or department that has an existing Pending Coeus record should be emailed to JHURA_JAWS@jhu.edu with the Coeus IPN. No intake sheet is required.

1. JHU Department – The department where the agreement will be housed and/or the work will be done.
2. Principal Investigator – The responsible JHU individual for performance of the work.
3. Department Point(s) of Contact – Include name(s) of all departmental contacts that will need to be able to view the JAWS record and/or can be contacted for questions.
4. Email Address for Confirmation of Submission – Include an email address to receive a copy of your submission.
5. Department Point(s) of Contact Email Address(es) – Include email address for point(s) of contact for the record.
6. COEUS/SAP Information, if applicable (PD number, IPN, SAP Grant #, etc.) – If the project is funded, include the COEUS information for a new award. If it’s a modification of a funded project, include the SAP number. If there is no money involved with the project (i.e., an NDA or MTA), write ‘N/A’.
7. Sponsor – The organization that directly funds a project or engages a PI in some activity. If multiple parties, include all.
8. Sponsor Contact Person – The person at the Sponsor who JHURA can contact with questions or negotiations. Generally someone in research administration or a legal office.
9. Sponsor Contact Person’s Email Address – The email of Sponsor Contact Person. Please upload any appropriate email correspondence when submitting through the intake form. 
10. Prime Sponsor (if applicable) – The organization providing the original source of funds as a pass-through to the Sponsor.
11. Nature of your request to JHURA –
   - Review New Agreement from Sponsor - If you have received a document from the sponsor or PI that needs to be reviewed, negotiated and/or signed by JHURA. Please attach this document when submitting the intake form.
• **Create New Agreement from JHU Template** – If you need JHURA to create an agreement using a JHU template. Please include all available documentation (SOW, email discussions, etc.) when submitting the intake form.

• **Modification or Amendment** – If you received a modification or amendment to an existing agreement. **Please certify that the PI has reviewed and approved content of modification.** If something is incorrect, please include clarification.

• **Create Modification/Amendment from JHURA Template** – If you need JHURA to draft a modification/amendment to an existing agreement (existing agreement may use JHURA template or sponsor template). Please submit all available documentation (SOW, email discussions, etc.) when submitting the intake form.

12. **Nature of the Activity** – Describe the general nature of the work to be done on the project. Select all that apply. For funded projects, this may be partially guided by which IDC rate you are using.

• **Research** – Sponsored project using organized research IDC rate.

• **Clinical** – Research project involving human subjects.

• **Academic/Curriculum** – Any project involving developing new or using existing courses or curriculum outside JHU.

• **Consulting Services** – Giving advice, no creation of new intellectual property, short term.

• **Technical Assistance** – Program evaluation, capacity building or other types of non-research sponsored activity.

• **Testing Services** – Work done by a service center is typically fall under this category

• **Training** - Training of JHU students/personnel.

13. **Project Goals and/or Deliverables** – Provide a layman’s description of the work that will be performed on the project or the activity that precipitated the document. Are you getting or receiving materials or data? Will there be intellectual property developed or used on the project? What is being delivered (i.e., reports, results, advice, software, training, etc.) Do not simply cut and paste or reference the Statement of Work.

14. **Other Agreements/Awards Related to this Document** – Please describe any existing related agreement to this activity. Is this an award that is a subsequent year of a project, but the sponsor sends a new agreement each year? Is this a teaming agreement that had an associated pre-teaming agreement? Is this phase II of an existing project? Is this a data use agreement related to an existing award?

15. **Other Information Needed to Process this Request** – If JHURA is required to draft an agreement, enter the type of agreement here. Are there any timing issues we may need to know about (i.e., an NDA is needed for a meeting PI is attending in 2 days)? Is there a special relationship with the sponsor that the PI has? Any other information that may provide context to the activity? Is this a JHURA template?

16. **Upload/Attach File** – Upload or attach the agreement and up to 3 additional files.

*Once the intake form is submitted, be sure to check in JAWS (jhurasystems.jhu.edu) frequently for the status of your agreement, just log in with your JHED. If you have any questions about a JAWS record, contact the Record Manager for more information.*