

INVENTION DISCLOSURE FORM GUIDE

What is an Invention Disclosure Form?

An Invention Disclosure Form (IDF) is a written description of your invention or discovery that is provided to iMM's Technology Transfer Office (TTO). It should list all collaborating sources of support and include as much information as possible to enable the TTO team to begin assessing protection, marketing, and commercialization activities. This document will be treated as 'iMM's Confidential', even if it might be shared with external organizations that contributed to the invention. Based on the Invention Disclosure, your assigned TTO officer may request a non-confidential description of your invention in order to assist in the assessment and marketing of the technology early on.

Why should I submit an Invention Disclosure Form?

When you disclose your discovery or invention to iMM's TTO, it starts a process that could lead to the commercialization of your technology. This may involve beginning the legal protection process and working to identify outside development partners. Furthermore, the National Code for IP and the iMM's IP Code require inventors to disclose new inventions in a maximum period of 3 months. Research sponsors may also require reporting or disclosure in the future. Some government funds require the filing of prompt disclosures, which will be reported to the sponsoring agency. Similar requirements may exist for other sponsored projects.

How do I know if my discovery is an invention?

You are encouraged to submit an IDF for all inventions and discoveries that you feel may solve a significant problem and/or have significant value. If you are in doubt, contact the TTO to discuss the discovery or invention and strategies for protection and commercialization.

When should I complete an Invention Disclosure Form?

You should complete an IDF whenever you feel you have discovered something unique with possible commercial value and never later than 3 months after the discovery or invention. This should be done well before presenting the discovery through publications, poster sessions, conferences, press releases, or other communications. Once publicly disclosed (i.e. published or presented in some form), an invention may have restricted or minimal potential for patent protection. Differences exist between the Portugal, the US and other countries on the impact of early publication on a potential patent. Be sure to inform your TTO of any imminent or prior presentation, lecture, poster, abstract, website description, research proposal, dissertation/masters thesis, publication, or other public presentation including the invention.

Should I disclose research tools?

Yes, if your new tools would benefit other researchers and you are interested in providing them to those researchers and other third parties you should contact the TTO. Typically, research tools are materials such as antibodies, vectors, plasmids, cell lines, mice, and other materials used as "tools" in the research process. Most research tools do not necessarily need to be protected by patents in order to be licensed to commercial third parties and/or generate revenue for your laboratory.

- If you have research tools that you believe to be commercially valuable, the TTO will work with you to develop the appropriate protection, licensing, and distribution strategy.
- If you wish to provide your research tools to other parties or are approached by other parties who wish to receive your research tools, you must contact the TTO who will work together with IMM's Legal Office to ensure the agreements are put in place to enable the Institute to share these research tools with other parties.

How do I submit an Invention Disclosure?

As soon as you have filled out the IDF, please send the file to imm-techtransfer@medicina.ulisboa.pt.

FILLING OUT THE INVENTION DISCLOSURE FORM

Getting Started

The completion of the IDF is the first step in the disclosure of new inventions made at iMM. The questionnaire serves three purposes. First, it is used as a source of basic information to assist the TTO in evaluating your invention. Second, the questionnaire serves as documentation and evidence of the creation of your invention. And, third, the questionnaire serves as a first disclosure to the patent attorney or patent agents that may be assigned to your invention and serves as an information base for patentability searches and opinions. The IDF is divided into five major sections. It is important that each be filled out completely.

#1 – Scientific Contributor Information

The information contained in this section will first be used to identify all those who participated in the inventive process. The balance of the information, such as identity, fiscal number, home address and telephone, will be included in various legal documents filed in the legally designated Patent Office and is also used for distribution purposes should your invention generate licensing income. It is therefore essential that each contributor is given the opportunity to review the information contained in the disclosure for accuracy and completeness. It is required that each contributor personally sign-off on the disclosure.

#2 – Description of the Invention

Your description of the invention will be used to evaluate the technology, for patenting compliance and for commercial potential as well as to initiate any marketing efforts by the TTO. Please be thorough in answering each question on the disclosure. Although some of the questions may at first glance appear to be similar, each is unique.

#3 – Publications and/or Oral Disclosures and Related Background Information

Publications and oral disclosures have a bearing on the potential patentability of your invention. Background technology information is used to assist in better understanding your invention as well as to identify potentially competitive technology. Should iMM elect to file a patent application for your technology, this information will be provided to legal counsel as part of the application process.

#4 – Financial Resources Used/Prior Obligations

Funding agencies, private grantors, and research sponsors might have rights in inventions. The information provided in this section will serve to protect the rights of those who have contributed resources to your project.

#5 – Non-Proprietary Description

This one-page summary will be used as a marketing resource by the TTO. This information can be filled out at a later stage.