

Institutional Contract Checklist

ContractType: Option Agreement

Outside Party Information

- Legal Name
- Other names such as DBA or “doing business as” or abbreviations.
- Type of Entity, including indicating if they are a startup.
- Main Address
- Point of Contact Information
 - Name, Title, Email Address, and Phone Number
- Signatory Information
 - Name, Title, and Email Address.

Agreement Information

- Synopsis: Goal of agreement
 - Invention Details: Reference number, title, name, inventor(s).
 - Provisional and non-provisional numbers with filing dates.
- Proposed Start and End dates for agreement
- Indicate if agreement is a renewal or amendment and provide details
- Exchange of funds: Expense and/or Revenue if applicable
- Indicate if UT Standard Contract Insurance Provisions need changes or to be waived

Documentation

- Exhibits, appendixes, and other supporting documentation.
- Optional: If not using UTEP Standard Agreement then include word doc for alternative agreement.