Research Lifecycle Programme

The University of Manchester

Contracting project

CDA/NDA Proof of concept (PoC): Internal Guidance for requesters

"How-to" Guide for requesting a new CDA/NDA

Audience: This guide is intended for anyone requesting a CDA/NDA using the new processes. It explains the new workflow for receiving, triaging, and processing confidentiality agreement requests via an MS Form linked to a SharePoint List.

Overview: This document shows users how to:
Request a CDA/NDA using the new Microsoft Form
Track your request through the confirmation email and SharePoint link
Understand what the Contracts Team will do once the request is submitted
Respond to any follow-up questions
Review and approve the draft agreement
Receive the final signed CDA/NDA
How to find out more information and provide feedback

Purpose of the Pilot

A new process is now in place to help you request Confidentiality Disclosure Agreements (CDAs) and Non-Disclosure Agreements (NDAs) more quickly and more easily. While the core steps of the existing process remain the same, improvements to automation, workload management and transparency should provide a smoother, more consistent experience.

This guide explains what you need to do and what you can expect.

Submitting your request

To request a CDA/NDA, requestors will now use the **CDA/NDA request form**.

The form asks for:
- PI name
- Your contact details
- The organisation involved in the discussion or collaboration
- The purpose of the disclosure – a short description is enough
- Any deadlines or time pressures
- Whether a student is involved in the work

It should take only a few minutes to complete.

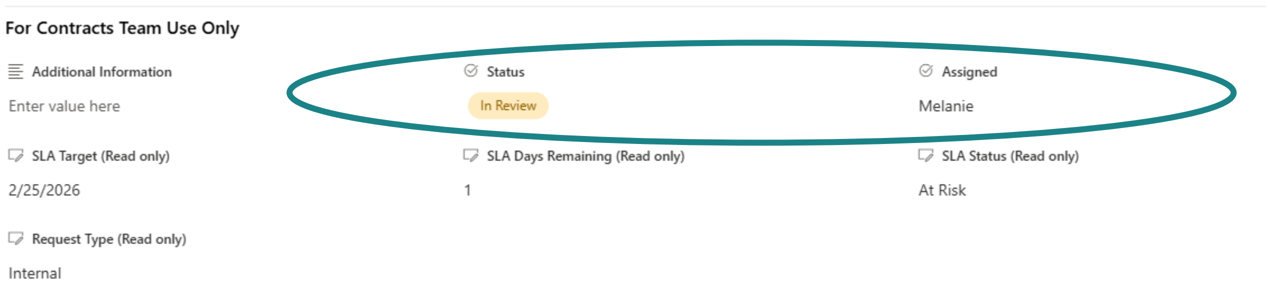
Track your request through the confirmation email and SharePoint link

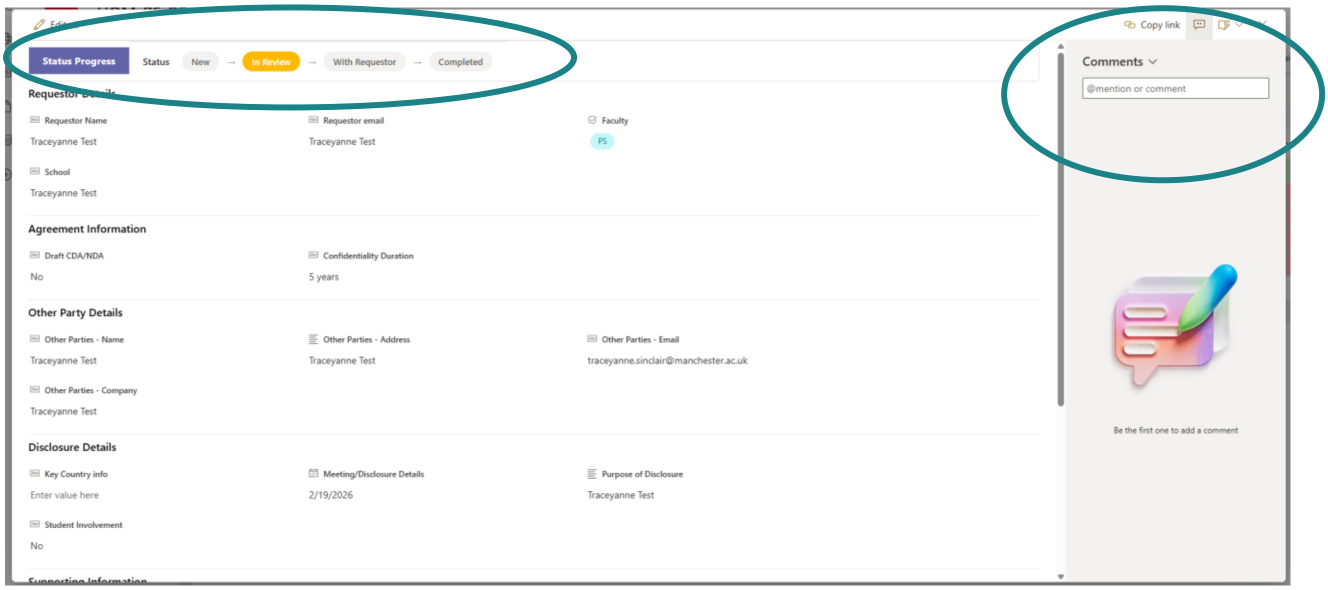
After you submit the form, you will automatically receive:
- A confirmation email

- A private link to your request in SharePoint

You can use this link at any time to:

- See the name of the Contracts Assistant handling your request
- Check the status (e.g., *In Review*, *With Partner*, *For Signature*)
- View any updates or notes





What the Contracts Team do once you submit your request

Once your form is received, the Contracts Team will triage your request, carry out any commercial or regulatory checks, draft the CDA/NDA (if a template has not already been uploaded), and manage conversations with partners and internal teams.

Signatures will be routed through DocuSign to give the team visibility of all pending requests.

Respond to clarification requests (if needed)

The Contracts Team may contact you through the CDA shared mailbox if they need additional information to progress your request. Using a shared inbox allows them to manage workload better, and as a result process CDA requests more efficiently.

Review and approve the draft agreement

You will receive a draft CDA/NDA to review. This is your opportunity to check the details and confirm that the terms accurately reflect the planned disclosure.

Receive the final signed CDA/NDA

When the agreement has been approved and signed, the Contracts Team will return the completed document to you and update the SharePoint status to *Completed*.

You will also be able to view the completed document in your Pure record, as well as the progress milestones.

Additional information and feedback

For more details about the new CDA/NDA process, including background context and future enhancements, please visit the Continuous Improvement section on StaffNet (where this guidance is hosted).

We're continuing to refine the process throughout the proof-of-concept period. If you would like to share your experience or suggest improvements, you can use our **online feedback form**. Your comments will help us understand what's working well and where further improvements are needed.