

GAIL NDA form completion process

From the GAIL Resources website, click on the **Resources** menu at the top and choose the **Forms and Policies** option. Then select the **Nondisclosure Agreement Forms** option.

<https://support.dar.uga.edu/GAIL/>

The screenshot shows the GAIL website interface. At the top, there is a navigation bar with links for "Go to GAIL", "Go to FAME", and "Go to Deposits". A search bar is located on the right. The main navigation menu includes "Training", "Resources", "ASKIT", "Contact", and "Give Now". The "Resources" dropdown menu is open, showing options: "GAIL Dictionary", "Naming Conventions", "GAIL Blog", "Guides & Videos", "Forms & Policies", and "G-Wiz". A blue arrow points to the "Resources" menu, another blue arrow points to the "Forms & Policies" option in the dropdown, and a third blue arrow points to the "Nondisclosure Agreement Forms" section on the page. The "Forms & Policies" section is highlighted in red. Below this section, there are several cards: "GAIL Access Form" (with a trophy icon), "GAIL Policies" (with a document icon), "Event Approval Form" (with a music note icon), "BBIS" (with a compass icon), "Nondisclosure Agreement Forms" (with a lock icon), and "Prospect Management Policies & Procedures" (with an information icon). Each card includes a brief description of the form's purpose.

The **Forms & Policies** page will display the information and requirements for allowing another person/company certain shareable GAIL data.

If you are a UGA full time employee that has a business need to share data with another person or a contracted vendor, you will choose one of the options marked with a [blue arrow](#) in the image below. A full time UGA employee will initiate both form types (depending on which is needed) and enter the Requester section for the person or vendor they are wishing to share GAIL data with.

Request Data

[HOME](#)

If you are a current GAIL user...

If you are a **current GAIL user** with your own access to the system, you can use GAIL locate the information you're interested in or request data by submitting an AskIT ticket. [Click here to go to the ticket system.](#)

If you, or the person needing the data, is not a GAIL user...

On rare instances, an approved user of GAIL may supply data to an *employee, volunteer, or company* to use outside of the GAIL system. If this is done, the user must:

1. Ensure a **non-disclosure form** has been signed with that employee, volunteer, or company including their GAIL lookup ID:

- **ATTENTION! PLEASE READ BEFORE SELECTING A FORM BELOW.** For both DocuSign forms...

- **REQUIRED:** Fill in YOUR name and UGA email in the first role fields.
- **REQUIRED:** Fill in the PERSON or COMPANY and signer's email in the second role fields.
- **DO NOT CHANGE** the Client Services Agent fields. All signers will receive an email inviting them to sign this document. Not completing both fields in both roles will void this agreement.



- [Mutual non-disclosure agreement for companies and organizations](#) [last updated 06/19/2020]
- [Mutual non-disclosure agreement for individuals](#) [last updated 06/19/20]

2. Ensure all data and communication about the **data are sent through SendFiles**, UGA's encrypted messaging service. Sending GAIL data through email is not secure, even to other individuals with university email addresses. (Here are some instructions on [how to use SendFiles.](#))

- [SendFiles application](#) login supported by EITS

3. Ensure the **data are discarded** once the project is complete or two weeks after receiving the data, whichever is shorter. For vendor's obtaining data, a full contract must be executed.

When you have signed and completed the appropriate form via DocuSign, a ticket for approval will be automatically be created through askit@uga.edu. Once approved it will appear on the constituent's profile under the [documents and interactions](#) tab. You can then forward data from GAIL (through SendFiles) to this individual or company, or if you need to request data, you can do so by [submitting an AskIT ticket](#).

Person / Individual

< - OR - >

Company/Business

PowerForm Signer Information

REQUIRED: Fill in YOUR name and UGA email in the first role fields.
REQUIRED: Fill in a PERSON and the signer's email in the second role fields.
DO NOT CHANGE the Client Services Agent fields. All signers will receive an email inviting them to sign this document. Not completing both fields in both roles will void this agreement.

Please enter your name and email to begin the signing process.

Your Role:

UGA Employee (Initiator)

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Role:
Person Requesting Data Share

Name:

Email:

Role:
UGA DAR Client Services Agent

Name:

Email:

[Begin Signing](#)

PowerForm Signer Information

REQUIRED: Fill in YOUR name and UGA email in the first role fields.
REQUIRED: Fill in the COMPANY and signer's email in the second role fields.
DO NOT CHANGE the Client Services Agent fields. All signers will receive an email inviting them to sign this document. Not completing both fields in both roles will void this agreement.

Please enter your name and email to begin the signing process.

Your Role:

UGA Employee (Initiator)

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Role:
Company Requesting Data Share

Name:

Email:

Role:
UGA DAR - Client Services Agent

Name:

Email:

[Begin Signing](#)

As the Initiator (full time UGA employee), you will fill in the information for the **UGA Employee (Initiator)** and the **Person Requesting Data Share** sections as shown above.

As you can see, the last section called **UGA DAR – Client Services Agent** is already auto-populated so that the completed forms will be automatically sent to the Client Services team for processing and recording into the GAIL system.

After you've entered information in the first 2 sections, click the **Begin Signing** button.

The DocuSign form will open in a web browser. You'll need to **click the box** indicated by a **yellow arrow** in the image below (I agree to...) and click the **Continue** button at the top right of the document.

Please Review & Act on These Documents DocuSign

DAR - Askit
University of Georgia

PRIVATE MESSAGE: Dear UGA Employee, On the last page, please enter your name (first and last) and your email address, along with all required fields. Once you've signed your part, the form will be emailed to the person you identified, as requesting [View More](#)

Please read the [Electronic Record and Signature Disclosure](#).
 I agree to use electronic records and signatures.

CONTINUE **FINISH LATER** **OTHER ACTIONS ▾**

1. **Purpose.** The parties wish to explore an opportunity of mutual interest and in connection with this opportunity, each party may disclose or have already disclosed to the other certain confidential technical and business information which the disclosing party desires the receiving party to treat as confidential.
2. **"Confidential Information"** means any information disclosed previously or in the future be either party to the other party, either directly or indirectly, in writing, orally or by inspection of tangible objects including without limitation, technical data, designs, drawings, specifications, techniques, models, data, documents, source code, object code, diagrams, flow-charts, research, development, processes, procedures, analysis and/or analytics, "know-how", new product or new technology information, prototypes, samples, information capable of being embodied in a patent application or copyright application or any international equivalent thereof, product copies, quantity of products and kind of products licenses. Product returns unannounced products, manufacturing, development or marketing techniques and materials, development or marketing timetables, strategies and development plans, including trade names, trademarks, customer, supplier or personal names and other information related to customers, suppliers or personnel, pricing policies and financial information, plant and equipment and other information of similar nature, and any trade secrets or nonpublic business information disclosed by Disclosure to Recipient either before or after the execution of this Agreement, which is designated as "Confidential," "Proprietary" or some similar designation. Information communicated orally shall be considered Confidential Information if such information is confirmed in writing as being Confidential Information with in a reasonable time after the initial disclosure. Confidential Information may also include information disclosed to a disclosing party by third parties. Confidential Information shall not, however, include any information which (i) was publicly known and made generally available in the public domain prior to the time of disclosure by the disclosing party; (ii) becomes publicly known and made generally available after disclosure by the disclosing party to the receiving party through no action or inaction of the receiving party; (iii) is already in the possession of the receiving party at the time of disclosure by the disclosing party as shown by the receiving party's files and records immediately prior to the time of disclosure; (iv) is obtained by the receiving party from a third party without a breach of such third party's obligations of confidentiality; (v) is independently developed by the receiving party without use of or reference to the disclosing party's Confidential Information, as shown by documents and other competent evidence in the receiving party's possession; or (vi) is required by law to be disclosed by the receiving party, provided that the receiving party gives the disclosing party prompt written notice of such requirement prior to such disclosure

Next, click the **START** button and it will take you to the point in the document where you will enter your information & signature. See image below.

Done! Select Finish to send the completed document.

FINISH FINISH LATER OTHER ACTIONS ▾

DocuSign Envelope ID: C5692597-B7BF-4CDA-9C6D-6F4F1642FFCA

UGA Employee (Affiliate/Sponsor):

Submitted by (name): Cindytest Initiator
Signature: <i>Cindytest Initiator</i>
School/College/Unit/Dept: Client Services
Email: cibond@uga.edu

Person Requesting Non-Disclosure Agreement:

Requested By (name):
Signature:
If UGA employee - Work/Job Title:
If Not a UGA employee - Connection to UGA:
Email or Phone:

THIS SECTION FOR INTERNAL USE ONLY:

University of Georgia Division of Development and Alumni Relations
Signature:
Printed Name:
UGA Work/Job Title:
Date:
Reference/Ticket#:

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When you click the **FINISH** button, the document will be emailed to the **Person Requesting** based on information you/the Initiator entered.

The **FINISH** button will launch an email to your inbox that contains the NDA form you just initiated.

The screenshot shows the Outlook interface with the following details:

- Navigation Pane (Left):** Favorites, Inbox (149), Unread Mail (703), Sent Items.
- Home Tab (Top):** Includes icons for New, Delete, Respond, Quick Steps, and Move.
- Quick Steps (Top Right):** Bond, Team Email, Reply & Delete, To Manager, Done, Create New.
- Email List (Bottom):**

	From	Subject	Received	Size
Today				
	DAR - Askit via DocuSign	NDA - Cindytest Requester	Thu 1/28/2021 8:44 AM	120 KB

Inside the email, click the **REVIEW DOCUMENT** link, this will launch the next step in the DocuSign process.

NDA - Cindytest Requester

 DocuSign System <dse_na2@docusign.net>
To  Cindy M Bond

Reply Reply All Forward ...

Thu 1/28/2021 8:44 AM

 If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.





DAR - Askit sent you a document to review and sign.



REVIEW DOCUMENT

DAR - Askit
askit@uga.edu

PRIVATE MESSAGE

Greetings,

A UGA Employee has initiated this non-disclosure agreement form in order to share secure data with you. On the first page, please enter your name (first and last) and today's date. On the last page, please enter your name (first and last), your email and all required fields. Please alert your UGA contact that you have signed the form via DocuSign as it may be flagged as spam and fall into a junkmail folder.

Thank you,
Client Services
UGA Division of Development and Alumni Relations

Cindytest Requester,

The Review Document button will take you to the DocuSign NDA for the **Requester** to complete their part. To get started, click the **CONTINUE** button at the top right section of the screen.

Please Review & Act on These Documents DocuSign

DAR - Askit
University of Georgia

PRIVATE MESSAGE: Greetings,
A UGA Employee has initiated this non-disclosure agreement form in order to share secure data with you. On the first page,
[View More](#)

Please review the documents below. **CONTINUE** **OTHER ACTIONS** ▾

- Purpose.** The parties wish to explore an opportunity of mutual interest and in connection with this opportunity, each party may disclose or have already disclosed to the other certain confidential technical and business information which the disclosing party desires the receiving party to treat as confidential.
- "Confidential Information"** means any information disclosed previously or in the future by either party to the other party, either directly or indirectly, in writing, orally or by inspection of tangible objects including without limitation, technical data, designs, drawings, specifications, techniques, models, data, documents, source code, object code, diagrams, flow-charts, research, development, processes, procedures, analysis and/or analytics, "know-how", new product or new technology information, prototypes, samples, information capable of being embodied in a patent application or copyright application or any international equivalent thereof, product copies, quantity of products and kind of products licenses. Product returns unannounced products, manufacturing, development or marketing techniques and materials, development or marketing timetables, strategies and development plans, including trade names, trademarks, customer, supplier or personal names and other information related to customers, suppliers or personnel, pricing policies and financial information, plant and equipment and other information of similar nature, and any trade secrets or nonpublic business information disclosed by Disclosure to Recipient either before or after the execution of this Agreement, which is designated as "Confidential," "Proprietary" or some similar designation. Information communicated orally shall be considered Confidential Information if such information is confirmed in writing as being Confidential Information within a reasonable time after the initial disclosure. Confidential Information may also include information disclosed to a disclosing party by third parties. Confidential Information shall not, however, include any information which (i) was publicly known and made generally available in the public domain prior to the time of disclosure by the disclosing party; (ii) becomes publicly known and made generally available after disclosure by the disclosing party to the receiving party through no action or inaction of the receiving party; (iii) is already in the possession of the receiving party at the time of disclosure by the disclosing party as shown by the receiving party's files and records immediately prior to the time of disclosure; (iv) is obtained by the receiving party from a third party without a breach of such third party's obligations of confidentiality; (v) is independently developed by the receiving party without use of or reference to the disclosing party's Confidential Information, as shown by documents and other competent evidence in the receiving party's possession; or (vi) is required by law to be disclosed by the receiving party, provided that the receiving party gives the disclosing party prompt written notice of such requirement prior to such disclosure and assistance in obtaining an order protecting the information from public disclosure.
- Non-use and Non-disclosure.** Each party agrees not to use any Confidential Information of the other party for any purpose except to evaluate and engage in the intended relationship between the parties. Each party agrees not to disclose any Confidential Information of the other party to any other third party. Neither party shall modify, alter reverse engineer, disassemble or decompile, enhance, or make derivative works or compilations or portions, or in any manner reproduce any

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Here you can see that the information entered for the **PERSON REQUESTING** is now populated in the first section of the form. Click **CONTINUE** then click **START** and it will take you to the section of the form that the **Requester** must complete and sign.

Select the sign field to create and add your signature.

FINISH

NEXT

UGA Employee (Affiliate/Sponsor):

Submitted by (name): Cindytest Initiator
Signature: <small>DocuSigned by:</small> <i>Cindytest Initiator</i>
School/College/Unit/Dept: Client Services
Email: cmbond@uga.edu

Person Requesting Non-Disclosure Agreement:

Requested By (name): Cindytest Requester
Signature: <small>Sign</small> ↓
If UGA employee - Work/Job Title: <input type="text"/>
If Not a UGA employee - Connection to UGA: <input type="text"/>
Email or Phone: <input type="text"/>

THIS SECTION FOR INTERNAL USE ONLY:

University of Georgia Division of Development and Alumni Relations
Signature:
Printed Name:
UGA Work/Job Title:
Date:
Reference/Ticket#:

FINISH

Click **FINISH** once all fields have been entered. The full document with signatures for **Initiator** and **Requester** will now appear on your screen. You can click **CLOSE** when you are finished reviewing it.



DocuSign Envelope ID: C5682587-87BF-4CDA-9C9D-EF4F1642FFCA

UGA Employee (Affiliate/Sponsor):

Submitted by (name): Cindytest Initiator
Signature: <i>Cindytest Initiator</i>
School/College/Unit/Dept: Client Services
Email: cibond@uga.edu

Person Requesting Non-Disclosure Agreement:

Requested By (name): Cindy Bond
Signature: <i>Cindy Bond</i>
If UGA employee - Work/Job Title: CS Associate Director
If Not a UGA employee - Connection to UGA:
Email or Phone: cibond@uga.edu

THIS SECTION FOR INTERNAL USE ONLY:

University of Georgia Division of Development and Alumni Relations
Signature:
Printed Name:
UGA Work/Job Title:
Date:
Reference/Ticket#:

-3-



Upon clicking the **CLOSE** button (either one), the completed form will display on your screen for you to view/save/finish the process.

Please review the documents below.

FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: C5692597-87BF-4CDA-9C6D-6F4F1642FFCA

MUTUAL NONDISCLOSURE AGREEMENT

THIS MUTUAL NONDISCLOSURE AGREEMENT is made and entered into as of 01/28/2021 8:45:30 EST, between The University of Georgia Development and Alumni Relations Division and Indytest Requester (Name of Requester).

- Purpose.** The parties wish to explore an opportunity of mutual interest and in connection with this opportunity, each party may disclose or have already disclosed to the other certain confidential technical and business information which the disclosing party desires the receiving party to treat as confidential.
- "Confidential Information"** means any information disclosed previously or in the future be either party to the other party, either directly or indirectly, in writing, orally or by inspection of tangible objects including without limitation, technical data, designs, drawings, specifications, techniques, models, data, documents, source code, object code, diagrams, flow-charts, research, development, processes, procedures, analysis and/or analytics, "know-how", new product or new technology information, prototypes, samples, information capable of being embodied in a patent application or copyright application or any international equivalent thereof, product copies, quantity of products and kind of products licenses, Product returns unannounced products, manufacturing, development or marketing techniques and materials, development or marketing timetables, strategies and development plans, including trade names, trademarks, customer, supplier or personal names and other information related to customers, suppliers or personnel, pricing policies and financial information, plant and equipment and other information of similar nature, and any trade secrets or nonpublic business information disclosed by Disclosure to Recipient either before or after the execution of this Agreement, which is designated as "Confidential," "Proprietary" or some similar designation. Information communicated orally shall be considered Confidential Information if such information is confirmed in writing as being Confidential Information with in a reasonable time after the initial disclosure. Confidential Information may also include information disclosed to a disclosing party by third parties. Confidential Information shall not, however, include any information which (i) was publicly known and made generally available in the public domain prior to the time of disclosure by the disclosing party; (ii) becomes publicly known and made generally available after disclosure by the disclosing party to the receiving party through no action or inaction of the receiving party; (iii) is already in the possession of the receiving party at the time of disclosure by the disclosing party as shown by the receiving party's files and records immediately prior to the time of disclosure; (iv) is obtained by the receiving party from a third party without a breach of such third party's obligations of confidentiality; (v) is independently developed by the receiving party without use of or reference to the disclosing party's Confidential Information, as shown by documents and other competent evidence in the receiving party's possession; or (vi) is required by law to be disclosed by the receiving party, provided that the receiving party gives the disclosing party prompt written notice of such requirement prior to such disclosure and assistance in obtaining an order protecting the information from public disclosure.
- Non-use and Non-disclosure.** Each party agrees not to use any Confidential Information of the other party for any purpose except to evaluate and engage in the intended relationship between the parties. Each party agrees not to disclose any

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The completed form will be sent to the Client Services team where it will be reviewed, approved, and processed. A final copy of the NDA will be added to the **Requester's** record in the GAIL system, under the **Documentation and Interactions** tab (see example below).

UGA Dashboard Contact Communications Personal Info Revenue Relationships **Documentation and Interactions** Attributes Vanguard Image

Documentation Summary **Constituent Documentation** Interactions Surveys

Documentation (5) + Add note + Add media link + Add attachment More ▾

Documentation type: Title: Apply Reset

Documentation type ▲	Date	Type	Title	Author
Attachment	1/28/2021	Nondisclosure Agreement	GAIL NDA Form	Bond, Mrs. Cindy M.