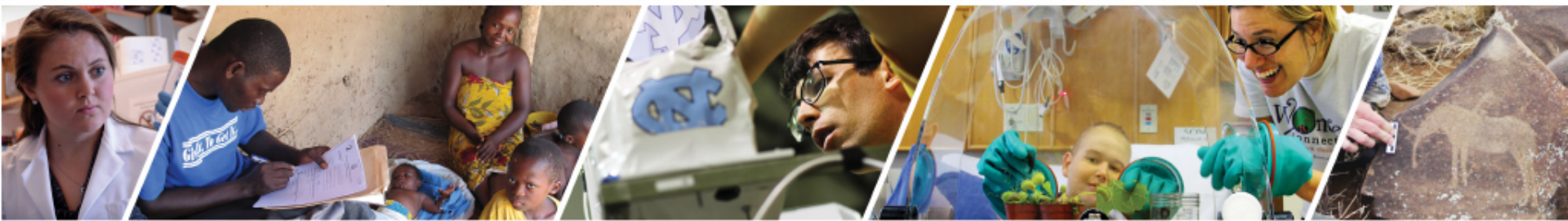


# PRINCIPAL INVESTIGATOR TRANSFERS

Lorrie Robbins, CRA, Office of Sponsored Research



UNC SYMPOSIUM  
*for*  
RESEARCH ADMINISTRATORS

Thursday, August 15, 2019  
UNC Friday Conference Center

# USEFUL RESOURCES:

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- Faculty/Research Separation Checklist:  
<https://research.unc.edu/sponsored-research/forms/#>
- Sponsor guidelines on transfers: all sponsors not the same.
- University policies and procedures on transfer: equipment, IP, etc.
- Have the conversation with your Sponsored Projects Specialist or Manager at OSR early!



# PRINCIPAL INVESTIGATOR LEAVING

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Notify OSR

- PI and effective date of transfer
- Provide signed relinquishment statement with direct and indirect balance
- Equipment being transferred
- Provide contact information for new institution



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# PRINCIPAL INVESTIGATOR LEAVING, cont.

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Submit Transfer  
Request

- OSR will submit request to sponsor
- New institution will submit their transfer proposal to sponsor
- Revised Notice of Award will be issued



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# PRINCIPAL INVESTIGATOR LEAVING, cont.

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Closeout

- Revision to end date made in our system
- Final FFR or invoice submitted to sponsor
- Project closed out internally



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# PRINCIPAL INVESTIGATOR COMING

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Notify OSR

- PI and effective date of transfer
- Provide contact information for previous institution
- Provide information on projects transferring in
- Equipment transferring in



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# PRINCIPAL INVESTIGATOR COMING, cont.

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## Transfer Process

- Previous institution will submit their transfer request to sponsor
- Sponsor will notify to submit our proposal
- Notice of Award will be issued
- Setup of Award



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# UNC UNITS THAT MAY BE INVOLVED

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1. Office of Sponsored Research
2. Industry Contracting-Industry sponsored awards
3. Office of Animal Care and USE (IACUC)-animals
4. Environment, Health and Safety-lab shutdown
5. Office of Human Research Ethics (IRB)-humans
6. Office of Clinical Trials
7. Finance and Operations-equipment transfer
8. Other Units depending on need

***Faculty/Research Separation Checklist:***

**<https://research.unc.edu/sponsored-research/forms/#>**



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