

**“Good-Bye BC”: PI Transfers
A Communication Resource**

P =primary responsibility
S= secondary responsibility
I= informational

<i>Responsibilities</i>	PI	Dept/Grant Administrators	OSP	Future Institution	Compliance Offices
Inform current institution (dept. chair, grant admin)	P	S	I		
Contact sponsoring agencies in advance of transfer date	S*		P		
Review account to see if equipment was purchased on it. (refer to Capital Equipment policy)	S	P	I		
Contact Compliance Office to discuss any possible IRB, IAUC, Materials Transfer or Intellectual Property issues	I	P			S
Sub-Award communication and transfer. (refer to Sub Award Dept. Modification Request form)	S	P	S		
Confirm status of existing personnel (i.e., terminate or initiate subcontract)	I	P	S		
If grant had cost-sharing, review account to determine if requirements have all been met		S	P		
Closeout all POs, Pcards, complete effort reports and clear all encumbrances. Complete closeout checklist		P	S		
Complete agency relinquishing docs, final invention statement and project report	S		P	I	

*varies with each agency