

## REQUEST TO TRANSFER

Externally sponsored projects are awarded to Temple University and involve multiple resources across the institution. As a result, the university reviews each award when faculty/researchers choose to leave the institution to determine whether the award will transfer with the PI, remain at Temple, or close.

Faculty/Researchers should complete the transfer request form and email the completed form to Jeffery Tolliver at [jeff.tolliver@temple.edu](mailto:jeff.tolliver@temple.edu) and the assigned Grants and Contracts Specialist in Research Administration. Once the form is approved, Research Administration will provide a checklist of activities that need to be completed prior to the individual's separation date.

PI/FACULTY NAME: _____ TU ID #: _____	
SCHOOL/COLLEGE: _____ DEPARTMENT: _____	
SEPARATION DATE: _____ NEW INSTITUTION: _____	
PI Request	OVPR Determination
ERA # _____ Grant # _____ Close. Award will be relinquished as of transfer date Transfer. Sub portion to Temple:    Yes    No Stay at Temple. Enter new PI: _____ Sub to transfer Institution:        Yes    No	Close Transfer. Sub to Temple:    Yes    No Stay. Enter new PI: _____ Sub to Institution:        Yes    No
ERA # _____ Grant # _____ Close. Award will be relinquished as of transfer date Transfer. Sub portion to Temple:    Yes    No Stay at Temple. Enter new PI: _____ Sub to transfer Institution:        Yes    No	Close Transfer. Sub to Temple:    Yes    No Stay. Enter new PI: _____ Sub to Institution:        Yes    No
ERA # _____ Grant # _____ Close. Award will be relinquished as of transfer date Transfer. Sub portion to Temple:    Yes    No Stay at Temple. Enter new PI: _____ Sub to transfer Institution:        Yes    No	Close Transfer. Sub to Temple:    Yes    No Stay. Enter new PI: _____ Sub to Institution:        Yes    No
ERA # _____ Grant # _____ Close. Award will be relinquished as of transfer date Transfer. Sub portion to Temple:    Yes    No Stay at Temple. Enter new PI: _____ Sub to transfer Institution:        Yes    No	Close Transfer. Sub to Temple:    Yes    No Stay. Enter new PI: _____ Sub to Institution:        Yes    No
ERA # _____ Grant # _____ Close. Award will be relinquished as of transfer date Transfer. Sub portion to Temple:    Yes    No Stay at Temple. Enter new PI: _____ Sub to transfer Institution:        Yes    No	Close Transfer. Sub to Temple:    Yes    No Stay. Enter new PI: _____ Sub to Institution:        Yes    No

**D# UW`m#F YgYUFW Yf`** \_\_\_\_\_

**5 ggc WUH`8 YUb`Z:f`**  
**F YgYUFW`cf`8 Yg][ bYY`** \_\_\_\_\_

**OVPR`** \_\_\_\_\_

## TRANSFER AND EXIT CHECKLIST

PI/BA/Dean: For awards that are transferring or closing, please complete the PI Tasks required clearances. Completed forms should be emailed to the assigned Grants and Contracts Specialist in Research Administration.

PI/FACULTY NAME: _____	TU ID #: _____
SEPARATION DATE: _____	NEW INSTITUTION: _____
NEW EMAIL: _____	

### 1. Principal Investigator Tasks

Please check off the items that apply and submit the document with this form to Research Administration.

<b>Sponsor Forms</b>	<p>Final Reports (if applicable)</p> <p style="padding-left: 20px;">Patent/Invention Disclosure</p> <p style="padding-left: 20px;">Technical and/or Final Report(s)</p> <p style="padding-left: 20px;">Agency relinquishing statement (if applicable)</p> <p>PHS</p> <p style="padding-left: 20px;">PHS 3734 (Official Statement Relinquishing Interest and Rights in a PHS Research Grant)</p> <p style="padding-left: 20px;">HHS 568 (Final Invention Statement and Certification)</p> <p>NSF</p> <p style="padding-left: 20px;">Detailed instructions/forms for a grant transfer are available electronically on the Fastlane (Website section entitled Principal Investigator (PI) Transfer)</p> <p>All Other Funding Agencies</p> <p style="padding-left: 20px;">A signed letter or form as identified by the agency (only if required by the PI)</p>
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<b>Administrative Contact at New Institution</b>	
Contact Name: _____	Contact Title: _____
Contact Email: _____	Institution IPF (For NIH Only): _____

### 2. Institutional Clearances

Please obtain the required clearances and signatures from each of the appropriate University officials.

<b>Research Equipment/Computers/Inventory</b>	
I certify that all Temple University property, including computers and research equipment, has been returned or approved for transfer and all obligations have been cleared.	
N/A	
_____	_____
Signature, Associate Dean for Research or Designee	Date

<b>Office of Environmental Health &amp; Radiation Safety</b>	
I certify that I have completed the laboratory closure procedures and proper handling, transfer, or disposal of chemicals, radioactive and biological materials, controlled substances, lasers and radiation generating equipment.	
N/A	
_____	_____
Signature, EHRS	Date

## TRANSFER AND EXIT CHECKLIST

PI/Business Administrator BA/Dean: For awards that are transferring or closing, please complete the PI Tasks and obtain the required clearances and signatures from each of the appropriate University officials. Completed forms should be emailed to the assigned Grants and Contracts Specialist in Research Administration.

PI/FACULTY NAME: _____	TU ID #: _____
SEPARATION DATE: _____	NEW INSTITUTION: _____
NEW EMAIL: _____	

<b>Office of Research Compliance</b>	
I certify that all Temple University research projects involving human subjects, biosafety, objectivity in research, or animals have been cleared.	
N/A	
_____ Signature, Office of Research Compliance	_____ Date

<b>Office of Technology Commercialization and Business Development</b>	
I certify that all Temple University active/pending invention disclosures, patents or patent applications have been cleared.	
N/A	
_____ Signature, Office of Tech Commercialization and Business Development	_____ Date

<b>Office of Research Administration: Post-Award Management</b>	
I certify that all effort reports have been certified. The individual with first hand knowledge of my effort that can certify on my behalf following my separation date is:	
_____	
_____ Signature, Research Administration Effort Coordinator	_____ Date

### 3. Research Administration Approval

For all awards transferring to another institution, note the date the relinquishment statement was sent to the sponsor, the date the final report or invoice was sent to the sponsor, and the final balance.

	Relinquishment Statement		Final Report/Invoice	
		Date Submitted	Date Submitted	Total Balance
ERA # _____ Grant # _____	_____	_____	_____	\$ _____
ERA # _____ Grant # _____	_____	_____	_____	\$ _____
ERA # _____ Grant # _____	_____	_____	_____	\$ _____
ERA # _____ Grant # _____	_____	_____	_____	\$ _____
ERA # _____ Grant # _____	_____	_____	_____	\$ _____