



# RESEARCH FACULTY OFF-BOARDING CHECKLIST

**Purpose:** The purpose of this document is to serve as a guide to departmental administrators during the separation of research faculty. This document should be utilized in tandem with the Dean's Office faculty separation protocol. It is the responsibility of the faculty person's department and the dean's office to ensure checklist completion.

## Faculty Information

### Personal Information

Full Name: \_\_\_\_\_  
*Last* *First* *M.I.*

Address: \_\_\_\_\_  
*Street Address* *Apartment/Unit #*

\_\_\_\_\_ *City* *State* *ZIP Code*

Home Phone: ( ) \_\_\_\_\_ Alternate Phone: ( ) \_\_\_\_\_

E-mail Address: \_\_\_\_\_

### Job Information

Title: \_\_\_\_\_ NetID: \_\_\_\_\_

Dept POC \_\_\_\_\_ Department: \_\_\_\_\_

Office Location: \_\_\_\_\_ Office Phone #: \_\_\_\_\_

Lab Location: \_\_\_\_\_ Lab Phone #: \_\_\_\_\_

Work Phone: ( ) \_\_\_\_\_ Cell Phone: ( ) \_\_\_\_\_

New Institution: \_\_\_\_\_

Name, Address & POC \_\_\_\_\_

\_\_\_\_\_

Anticipated separation date: \_\_\_\_\_

## CHECKLIST

Timeline <small>(days prior to separation)</small>	DATE COMP.	N/A	ACTION ITEMS
<b>ADMINISTRATION</b>			
			1. CONTACT DEAN'S OFFICE AND VICE PRESIDENT FOR RESEARCH OFFICE
			Notify of faculty separation.
			Discuss Transfer of data and or samples from clinical studies.

		<b>2. CONTACT ORSP</b>
		<a href="https://research.musc.edu/resources/orsp">https://research.musc.edu/resources/orsp</a>
		Contact Grant Administrator to notify any federal agency of intent to transfer award(s) to new institution.
		Contact Grant Administrator to advise on intent to terminate, or transfer PI, on any corporate sponsored research.
		Data/Material Transfer agreements – If transferring data and/or samples
		Contact Grant Administrator to ensure sponsored award reporting is complete
		<b>3. CONTACT GRANTS &amp; CONTRACTS ACCOUNTING</b>
		<a href="https://horseshoe.musc.edu/university/finance/our-services/gca">https://horseshoe.musc.edu/university/finance/our-services/gca</a>
		Contact Grant Administrator to discuss preparation of federal award relinquishing statement (as needed).
		Contact Grant Administrator to discuss status of invoicing/payment for corporate sponsored awards (as needed).
		<b>4. CONTACT IRB</b>
		<a href="https://research.musc.edu/resources/ori/irb">https://research.musc.edu/resources/ori/irb</a>
		Closeout or transfer PI, on open IRB protocols.
		Update study information on ClinicalTrials.gov.
<b>PERSONNEL &amp; NETID MAINTENANCE</b>		
		<b>5. CONTACT HUMAN RESOURCES</b>
		To deactivate or transfer fully sponsored NetIDs – contact 792-9825
		Discuss research staff reassignment/termination
		<b>6. CONTACT HEALTH INFORMATION SERVICES</b>
		To deactivate external monitor NetID access – 876-8037
		<b>7. CONTACT SCTR</b>
		To deactivate affiliate NetID – submit request via SPARCRequest ( <a href="http://sparc.musc.edu">http://sparc.musc.edu</a> )
<b>LABORATORY BIOSAFETY AND ANIMAL PROTOCOLS</b>		
		<b>8. CONTACT IACUC -</b> <a href="http://academicdepartments.musc.edu/research/ori/iacuc/">http://academicdepartments.musc.edu/research/ori/iacuc/</a>
		Discuss processes to terminate or transfer protocol
		<b>9. . CONTACT DLAR-</b> <a href="https://academicdepartments.musc.edu/dlar/index.htm">https://academicdepartments.musc.edu/dlar/index.htm</a>
		Discuss processes to care for animals in-house including accounts, discuss movement or transfer of equipment, discuss export of animals.
		<b>10. CONTACT IBC -</b> <a href="https://research.musc.edu/resources/ori/ibc">https://research.musc.edu/resources/ori/ibc</a>
		Discuss transfer to another PI or termination of registration (as needed).
		<b>11. CONTACT OSHP – INITIATE LABORATORY CLOSEOUT</b>
		Occupational Safety and Health Programs (OSHP) Office – 792-3604
		Laboratory Relocation Guidelines - <a href="https://web.musc.edu/about/leadership/institutional-offices/finance/risk-management">https://web.musc.edu/about/leadership/institutional-offices/finance/risk-management</a>
<b>INTELLECTUAL PROPERTY AND RESEARCH RECORDS</b>		
		<b>12. CONTACT FOUNDATION FOR RESEARCH DEVELOPMENT</b>
		For intellectual property issues & patents - <a href="http://academicdepartments.musc.edu/frd/">http://academicdepartments.musc.edu/frd/</a>
		<b>13. REVIEW FIXED ASSETS &amp; STORAGE</b>
		Surplus - <a href="http://academicdepartments.musc.edu/vpfa/forms/property/pea_form.pdf">http://academicdepartments.musc.edu/vpfa/forms/property/pea_form.pdf</a>
		<b>14. RECORD STORAGE AND RETENTION</b>
		Department Administration should ensure that original research records remain with the Medical University
		Department Administration should ensure that all study materials, both electronic and hard copy, are available/accessible for audit, during and after PI separation

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Dept/Div Chair

X

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Faculty Member

X

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Dean's Office