

Task	PI/Department	Task	SPA Analyst	Task	Fixed Asset	Task	New Institution
1.	Inform SPA Analyst and Program Official as early as possible: a. Expected date of transfer b. Awards to be transferred c. Name of New Institution d. Contact at New Institution	2.	Facilitate the transfer process by coordinating with the PI/Department and other OHSU units to assemble and submit the required Relinquishment documents.				
3.	a. Notify Fixed Assets of the transfer b. Request a listing of all equipment purchased by PI			4.	a. Generate equipment list based on PI and provider code. b. Forward equipment list to department with a copy to SPA; or c. Notify Dept. that query returned no results.		
5.	a. Verify that equipment listing is all-inclusive b. Add additional equipment if necessary c. Identify disposition of equipment d. Notify Fixed Assets of equipment identified as surplus or for transfer to another OHSU PI/Department e. Merge equipment listing into Equipment Transfer Request Form sent by SPA f. E-mail completed Equipment Transfer Form to SPA Analyst	6.	a. Email blank Equipment Transfer Form to Dept b. Determine applicable equipment disposition based on sponsor guidelines. c. Verify equipment accountability due to vesting or ownership rights. d. Update Equipment Transfer Form to reflect only equipment to be transferred e. E-mail updated Equipment Transfer Request Form along with Equipment Relinquishment Letter to PI/Dept for review.				
7.	Secure signatures on both Relinquishment/Transfer letter and Equipment Transfer Request form from: a. PI b. Chair (as approval) c. Dean (as approval) d. Return both to SPA Analyst	8.	a. Secure Institutional Approval of Relinquishment documents. b. Submit Relinquishment documents to new Institution for acceptance and signatures			9.	a. Accept equipment transfers b. Sign Equipment Relinquishment documents and c. Return signed Relinquishment documents to SPA Analyst

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		10.	<ul style="list-style-type: none"> <li>a. Make copies of signed Relinquishment documents received from new institution for files.</li> <li>b. Forward original Relinquishment Documents to Fixed Assets</li> </ul>	10.	<ul style="list-style-type: none"> <li>a. Remove from OHSU's inventory those equipment listed on the Relinquishment Documents signed by both OHSU and the new institution.</li> </ul>		
		11.	<ul style="list-style-type: none"> <li>a. Perform an analysis of PI's Portfolio of grants</li> <li>b. Ask Department what accounts the Chair will agree to be transferred.</li> <li>c. Determine the transfer procedure based on account's sponsor requirements.</li> <li>d. Notify Research Grants &amp; Contracts Administration of any sub-awards that should be terminated.</li> </ul>				
12.	PI submits all non-financial documents requested as soon as possible. Requested Documents might include but not limited to: <ul style="list-style-type: none"> <li>a. Progress Report</li> <li>b. Final Invention Statement</li> <li>c. Certified Effort Report</li> <li>d. Award application documents required to be submitted through new institution.</li> </ul>	13.	<ul style="list-style-type: none"> <li>a. Prepare Relinquishment documents in accordance with sponsor requirements.</li> <li>b. Forward Relinquishing documents to PI and Department for review and concurrence.</li> <li>c. Allow five days grace before assumed concurrence.</li> <li>d. Maintain contact with each sponsor and PI to ensure documents are received and processed in a timely manner.</li> </ul>				
		14.	<p>Once awards are officially relinquished by sponsor/s:</p> <ul style="list-style-type: none"> <li>a. Prepare and submit Final Financial Reports.</li> <li>b. Close OGA Awards.</li> </ul>				