Date: February 18, 2016

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CC: OSPA-Awards, OSPA-Proposals, OIPTT, SPA Accountant, Pam Olson

**Subject: Project & Account Updates: PI Retirement, Resignation, or Transfer**

It has come to our attention that you will be departing Iowa State University and currently have the following active projects/accounts at ISU.

Please complete and return this form to [polson@iastate.edu](mailto:polson@iastate.edu) so that we may assist you in making all necessary changes for your upcoming retirement, resignation, or transfer to another institution.

**Last date of ISU employment:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**New institution (if applicable):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Please complete the table below for actions regarding each of your accounts: (if more space is needed, please use the back of this form.)*

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| **Account Number** | **Requested Action**  **(1-10 from below)** | **Comments** |
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Requested Actions:

1. No change to lead PI at ISU, if departing PI is granted emeritus, affiliate or collaborator status at ISU.
2. Change the lead PI at ISU. Please indicate name of new ISU lead PI in comments.
3. Change the lead PI at ISU and subaward part of the funds to the new institution so the departing PI may continue work on the project there. Please indicate name of new ISU lead PI in comments.
4. Transfer an active award with the lead PI to the new institution.
5. Transfer an active award with the lead PI to the new institution, and subaward part of the funds back to ISU if any activity is to continue here. Please indicate name of ISU PI for subaward.
6. Terminate the project and return unspent funds to the sponsor.
7. The project is fixed price, completed and all funds have been received. The balance on the project is residual funds and will be transferred to the department or another ISU PI.
8. Incentive account (490): please transfer balance to the 290 or 490 account indicated in comments.
9. Foundation parallel account (497): department must contact ISU Foundation to change PI.
10. Other – please provide an explanation.

It is important to review the status for all active projects and confirm that all technical reporting has been submitted to each sponsor. Failure to submit all technical reports may result in the sponsor not accepting or reviewing any future grant applications from the PI or ISU. For additional guidance on Departure of a Principal Investigator from Iowa State University, please review the PI Transfer Process document found at <http://www.ospa.iastate.edu/proposal>.

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Signature and Date Signature and Date

**Principal Investigator Chair, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Department Name

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Signature and Date Signature and Date

**Chair, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Chair, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** Department Name Department Name

***Return this completed form to*** [***polson@iastate.edu***](mailto:polson@iastate.edu)***.***

*Additional Accounts:*

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| **Account Number** | **Requested Action**  **(1-10 from below)** | **Comments** |
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