Offboarding Checklist for Departing Research Faculty

This checklist has been developed by the Office of Research to help investigators and their support staff when offboarding an active research program from MCW. Offboarding actions should be initiated prior to departure to ensure adequate notice and ability to access any necessary forms or systems. For questions about any of these steps, reach out to the contact listed. For general questions, contact research@mcw.edu.

Grants & Contracts Offboarding

☐ Transfer Funds to another MCW Investigator

☐ Transfer Funds from MCW to another institution

☐ Close existing research accounts

☐ Withdraw FPs in Presubmission state

☐ Transfer equipment

Research Data Offboarding

☐ Copy Research Data and Materials

☐ Transfer Research Data and Materials to another institution

eBridge Access

☐ Termination of eBridge Access

☐ Transition to Adjunct Faculty Status

☐ Transition to Emeritus Status

Human Subjects Research Offboarding

☐ Closeout IRB Protocols

☐ Transfer IRB Protocols

☐ Complete/transfer study records on ClinicalTrials.gov

☐ Withdraw Protocols in Presubmission state

Animal Research Offboarding

☐ Close or Transfer existing AUAs

☐ Arrangements for remaining animals

☐ Withdraw AUAs in Presubmission state

Safety Offboarding for Biohazards, Radiation and Chemicals

☐ Biohazard Clearance Inspection

☐ Radiation Clearance Inspection

☐ Hazardous Chemical Clearance Inspection

☐ Notify IBC of closure/transfer of IBC protocols

☐ Decommission laboratory

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Grants & Contracts Offboarding		
Process	**Action**	**Contact**
Transfer Funds to another MCW Investigator	Investigator must initiate steps to transfer their funding to another MCW faculty member.	Contact your designated GCO Analyst or grantsandcontracts@mcw.edu
Transfer Funds from MCW to another institution	Investigator must initiate steps to transfer fund from MCW to another institution via relinquishment statement from MCW. This process is outlined on the GCO InfoScope site: Grantee Transfer From MCW	Contact your designated GCO Analyst or grantsandcontracts@mcw.edu
Close existing research accounts	Investigator must follow-up on the closing of open research accounts with Sponsored Programs.	Contact the SP Office: SponsProg_Help@mcw.edu
Withdraw FPs in Presubmission state	Investigator must withdraw Funding Proposals that are in Presubmission state in eBridge.	Contact the eBridge Help Desk: Service Request Form (414) 955-8476
Transfer equipment purchased with research funds	For equipment located on MCW property and purchased with research dollars, Investigator must request approval from the Controller's Office/Sponsored Programs to move to another institution.	Contact the SP Office: SponsProg_Help@mcw.edu

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Human Subjects Research Offboarding		
Process	**Action**	**Contact**
Closeout existing IRB protocols (PROs)	Investigator must close existing IRB protocols (PROs) prior to departure. • To close projects granted exempt status, contact irboffice@mcw.edu. • To close studies requiring continuing progress reports, file a "final continuing progress report" for each study in eBridge. • To close Registered studies, click the "Complete the Project" activity in eBridge. • If a Reliance Agreement is in place (an external IRB is the IRB of record) contact MCWIRBReliance@mcw.edu	Contact the IRB Office: IRBoffice@mcw.edu
Transfer IRB Protocols	**To transfer a study to another PI within MCW:** An amendment to the PRO must be filed within eBridge by the Investigator. Include in the submission an "Agreement of Investigator Responsibilities" form signed by the new PI. **To transfer a study to another institution:** Investigator must first close the PRO at MCW and then initiate steps to reopen the study at the new institution. See information below for Research Data Copy/Transfer.	Contact the IRB Office: IRBoffice@mcw.edu
Complete/transfer existing study records on CT.gov, including results reporting if required	**To close the study record**: CT.gov study record must be updated, including required results reporting for an Applicable Clinical Trial (ACT) or Probable ACT (pACT), including for pre-mature study closure/low study accrual.* **To transfer a study to another PI within MCW:** Once PRO amendment is approved, the Investigator must work with PRS Administrators in CTSI to update record with new Responsible Party. **To transfer the study to another institution**: the departing investigator must work CTSI CTO to initiate transfer. Permissions must be in place prior to transfer. ***Note:** Per MCW policy, Dept Chair becomes responsible for CT.gov record if departing faculty does not address record prior to departure*	Contact the CTSI Clinical Trials Office: mcwcto@mcw.edu
Withdraw PROs in Presubmission state	Investigator must withdraw PROs in Presubmission state in eBridge.	Contact the eBridge Help Desk: Service Request Form (414) 955-8476

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Animal Research Offboarding		
Process	**Action**	**Contact**
Close or Transfer existing Animal Use Agreements (AUAs)	Investigator must close or transfer existing Animal Use Applications (AUAs) prior to departure. **To transfer an AUA to another PI within MCW:** Investigator clicks "Transfer AUA" button in the AUA Workspace they wish to transfer, then select the PI to whom the AUA will be transferred. A copy of the AUA will be generated within eBridge and assigned a new ID number. The recipient PI must then submit the "new" AUA for IACUC review and approval. **To transfer a study to another institution:** Investigator must first terminate the AUA at MCW, then initiate steps to reopen the study at the new institution. All proper permissions must be in place prior to transfer. See information below for Research Data Copy/Transfer.	Contact the IACUC Office: IACUCadmin@mcw.edu
Make arrangements for any remaining animals	Investigator must make final arrangements for all animals remaining on any AUAs that will be closed as a result of their departure.	Contact the Biomedical Resource Center: BRCadmin@mcw.edu
Withdraw AUAs in Presubmission state	Investigator must withdraw AUAs in Presubmission state in eBridge.	Contact the eBridge Help Desk: Service Request Form (414) 955-8476

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Safety Offboarding for Biohazards, Radiation and Chemicals		
Process	**Action**	**Contact**
Schedule Biohazard Clearance Inspection	Investigator must notify the Biological Safety Officer (BSO) of departure so any related clearance inspections or hazardous shipping can be scheduled prior to the investigator's departure.	Contact the Biological Safety Officer (EHS): SafetyInfo@mcw.edu
Schedule Radiation Clearance Inspection	Investigator must notify the Office of Radiation Safety to schedule the transfer/disposal of all radioactive material stock, samples, and waste. All labeled radioactive use areas and equipment need to be metered, swipe surveyed and results documented prior to the investigator's departure.	Contact the Radiation Safety Office: radsafety@mcw.edu
Schedule Hazardous Chemical Clearance Inspection	Investigator must notify the Chemical Hygiene Officer so any related clearance inspections or hazardous shipping can be scheduled prior to the investigator's departure.	Contact the Chemical Hygiene Officer (EHS): SafetyInfo@mcw.edu
Notify Institutional Biosafety Committee (IBC)	Investigator must notify the IBC to 1) obtain procedure for properly closing/transferring IBC protocols; 2) disclose biological materials that may need disposal; and 3) ensure any needed inspections are conducted prior to the investigator's departure	Contact the IBC Coordinator: IBCSafety@mcw.edu
Decommission Laboratory	Following the steps on the Lab Decommissioning Checklist. More info can be found on the Environmental Healthy & Safety Lab Decommissioning and Moving Procedures page on InfoScope.	Contact EHS: SafetyInfo@mcw.edu

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Research Data Offboarding		
Process	**Action**	**Contact**
Copy Research Data and Materials	Investigator must complete the Research Data Offboarding Survey to outline the data they wish to copy as well as the status of any PROs or AUAs associated with the data. They must also indicate how the storage of the original data will be paid for. The Investigator must await approval to copy research data.	Contact the Office of Research: research@mcw.edu
Transfer Research Data and Materials to another institution	Investigator must complete the Research Data Offboarding Survey to outline the original data they wish to transfer as well as the status of any PROs or AUAs associated with the data. They must also upload a letter from the new institution providing assurance that the new institution accepts custodial responsibility for the materials and data and guarantees MCW access to the materials and data upon reasonable request. A templated Letter for New Institution Assurances Template (DOCX)) is available. The Investigator must await approval to copy research data.	Contact the Office of Research: research@mcw.edu

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eBridge Access		
Process	**Action**	**Contact**
Termination of eBridge Access following last day	Submission of the ePASS form by the department establishes the Investigator's termination date in Oracle which also serves as the end date for access to eBridge.	For questions, contact the Office of Research: research@mcw.edu
Transition to Adjunct Faculty Status following last day	An Investigator's academic home department is responsible for submitting any requests for adjunct status. If the Investigator is approved to maintain adjunct status following full time employment, they should notify the Office of Research to request continued access to eBridge as this does not happen automatically. Investigators with an Adjunct faculty title <u>may</u> be eligible for PI status on funding proposals, PROs, AUAs, or IBC applications and should consult with the Office of Research to determine the application of the PI Eligibility Policy as needed.	Contact the eBridge Help Desk: Service Request Form (414) 955-8476 For questions, contact the Office of Research: research@mcw.edu
Transition to Emeritus Status in retirement	An Investigator's academic home department is responsible for submitting any requests for Emeritus status. If the Investigator is approved to maintain Emeritus status following full time employment, they should notify the Office of Research to request continued access to eBridge as this does not happen automatically. Investigators with an Emeritus faculty title <u>may</u> be eligible for PI status on funding proposals, PROs, AUAs, or IBC applications and should consult with the Office of Research to determine the application of the PI Eligibility Policy as needed.	Contact the eBridge Help Desk: Service Request Form (414) 955-8476 For questions, contact the Office of Research: research@mcw.edu