Clemson University

**Procedure for Transferring a Sponsored (Fund 20) Project**

*Effective 6/1/15*
*Revised 10/15/15*

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<td>1</td>
<td>When a Principal Investigator (PI) is terminating employment with Clemson University (CU), the Administration has the option of transferring the project to the new University, or appointing a new, qualified PI at CU, or relinquishing the award back to the sponsor.</td>
<td>Dept Adm, PI, CPAC</td>
<td>See Policy on Transferring a Sponsored (Fund 20) Project and Checklist for Principal Investigators (PIs) Terminating from Clemson University or Going on Extended Leave</td>
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| 2               | CPAC will initiate the checklist (1 project per form) and coordinate the approval package of the transfer through the University channels. *Include Cost Share Expenditures if applicable* | CPAC, PI, Dept Ch, Dean or ADR | Approval Package contains:  
- Completed Checklist for PI Terminating from Clemson University  
- Approval from Research Compliance and Safety  
- Approval from the PI, Department Chair (Dept Ch) and Dean or Associate Dean for Research (ADR)  
- Effective Date of the Transfer  
- Summary of Work Completed at CU and Work to be Completed at the New University |
| 3               | CPAC will email Approval Package to respective GCA-FM. | CPAC, GCA-FM | CPAC will note in the Subject Line of email: Project Transfer – project #XXX-XXXXX |
| 4               | GCA-FM will obtain patent/invention information from the PI and the Office of Technology Transfer (OTT) and any other documentation required by the sponsor. | GCA-FM, PI, OTT | GCA-FM will run an equipment report and email the PI and the OTT to request other information. |
| 5               | GCA-FM will obtain approval from the Vice President for Research (VPR). | GCA-FM, VPR | The information sent to the VPR will include the checklist and a note about equipment expenditures, intellectual property, copyrights, etc. |
| 6               | GCA-FM will coordinate with the Research Contracts Specialists, sub-awardees (if applicable) and the CPAC to verify final costs. | GCA-FM, CPAC | GCA-FM will pay final sub-awardee invoice(s). |
| 7               | GCA-FM will submit the final invoice/draw and the Request for Transfer to the sponsor and financially close the project at CU. CPAC will return the balance of the Cost Share to the appropriate departments. | | This will be done via email, letter, or electronic submission. |

**Key:**
- PI = Principal Investigator
- CPAC = College Post Award Contact
- OTT = Office of Technology Transfer
- Dept Adm = Department Administrator
- ADR = Associate Dean for Research
- VPR = Vice President for Research
- Dept Ch = Department Chair
- GCA-FM = Grants and Contracts Administration Fiscal Manager