



Retiring PI Close-out Checklist

PI Name: _____ Phone: _____ Email: _____
 Alternate POC Name: _____ Phone: _____ Email: _____
 Department: _____ Sponsor: _____
 Award Number: _____ Fund Number: _____
 Grant Title: _____
 Retirement Date: ____ / ____ / ____ Grant Start/End Date: _____

Will a no-cost extension be requested for this grant (Yes/No): _____
 Future involvement with this project (stays on as Emeritus PI, Co-PI, Some involvement, None):
 _____ (if stays on as Emeritus PI, Jump to the signatures)

If you plan to remain active as an Emeritus PI, you must be approved by PSU as Emeritus faculty, have a newly executed [IP Agreement](#), and a [MOU](#) for retired faculty. See GURU policies [RA03](#) and [RAG03](#).

New PI Name: _____ Phone: _____ Email: _____
 Department: _____

Signatures certify that the following have been negotiated to the satisfaction of the PI, Department and College. Check all boxes that apply.

- Change of PI request submitted to Sponsor by OGS on _____, Approval received on _____
- Subcontracts notified of new PI (work with OGC staff)
- No cost extension completed
- Support of grad students/ fellows
- Relevant notifications have been made to Compliance Units including but not limited to:
 - IRB IACUC Biosafety Conflicts of Interest Export Controls
- Final reports completed (if applicable)
 - Patent/Invention
 - Technical
 - Financial
- Sponsor Actions:
 - PHS 3734 (Official Statement Relinquishing Interest and Rights in a PHS Research Grant)
 - HHS 568 (Final Invention Statement and Certification)
 - NSF Detailed instructions/forms for a grant transfer are available electronically on the *Fastlane* Website section entitled PRINCIPAL INVESTIGATOR (PI) TRANSFER
 - ALL OTHER FUNDING AGENCIES**
A signed letter or form as identified by the agency
- Research Accounting has been notified so that they can complete the Final Financial and Final Property Reports
- Agency cost sharing requirements have been met
- Original data is owned, and secured by PSU. The PI may create copies of data for academic purpose

PI _____ Date _____
 Dept. Head _____ Date _____

Please forward this form and appropriate attachments to the Office of Grants and Contracts, l-ag-contgrnts@lists.psu.edu