



Faculty Departure Checklist for Administrators

Please use this checklist as a reference guide for processing faculty who are departing the Albert Einstein College of Medicine. Once this form is complete, the signed form should be emailed to Brian Pelowski.

Notify Dean's Office

- Email Shelly Motzkin at shelly.motzkin@einsteinmed.org
- Email Brian Pelowski at brian.pelowski@einsteinmed.org

Laboratory

Clearance:

- Complete [Laboratory Equipment Checklist](#) and submit to delia.vieira-cruz@einsteinmed.org
- Complete [Equipment Clearance Checklist](#) and submit to delia.vieira-cruz@einsteinmed.org
- Complete [Clearance Request Form](#) and submit to delia.vieira-cruz@einsteinmed.org

Equipment:

- Contact Joseph D'Errico, Inventory Manager in Research Finance for a preliminary listing of grant funded equipment for PI review: joseph.derrico@einsteinmed.org
- Using the preliminary listing provided from INSITE by Joe, conduct an inventory of lab equipment and indicate which items the PI would like to either transfer and/or dispose of (broken equipment).
- Email Brian Pelowski at brian.pelowski@einsteinmed.org to review inventory.
- Once Brian approves, complete the [Request for Transfer of Equipment Form](#) (FIN-FRM-2018-007) and have it signed by the Department Chair.
- Send the signed Request for Transfer of Equipment Form to joseph.derrico@einsteinmed.org.

Common Areas:

- Remove Items from Common Areas
- Label anything left in Common Areas

Cold/Freezer Rooms:

- Remove Items from Cold/Freezer Rooms
- Label anything left in Cold/Freezer Rooms

Institute for Animal Studies (if applicable)

- Notify Larry Herbst at lawrence.herbst@einsteinmed.org
- Review [Animal Departure Policy](#)
- Complete [IAS Documentation](#) to Arrange for Animal Transfer or Disposition
- Arrange for the Transfer or Closure of all Protocols
- Close all pending per diem and other animal charges in eSirius

Office of Human Research Affairs (if applicable)

- Notify OHRA of Pending Departure at irb@einsteinmed.org
- Arrange for the Transfer or Closure of all Protocols
- Update CT.gov (if applicable)

Human Resources/Faculty Appointment

- Meet with Human Resources Department regarding employment and benefit issues
- Meet with Office of International Services regarding visa matters (if applicable)
- Complete Faculty [Appointment Termination Department Recommendation Form](#), and submit to Office of Academic Affairs at academicappointments@einsteinmed.org. If applicable, append the Faculty Resignation Letter.
- Submit EPAF for Termination (if on the Einstein payroll).

Research Finance and Office of Grant Support

- Transfer and/or Close-out of research/sponsored programs
- Ensure all transactions have posted to the general ledger (invoices, travel, subcontract vouchers)
- Work with Department Administrator regarding the future plans for personnel
- Close out all Procurement Transactions (PO's, iLab)
- Certify Effort Reports

If NIH....

- Complete all non-financial fields on Relinquishing Statement ([PHS Form 3734](#)) in ERA Commons and route to Denise Giocondo at denise.giocondo@einsteinmed.org.
- Denise will complete all financial fields on Relinquishing Statement in eRA Commons and will route to PI
- The PI will receive notification from eRA to approve the Relinquishing Statement in eRA Commons.
- The PI needs to approve the Relinquishing Statement in eRA Commons. (Note: eRA COMMONS will notify Denise, when complete).
- Denise will approve Relinquishing Statement in eRA Commons.
- Denise will complete and submit the Federal Financial Report (FFR). (<https://www2.nsf.gov/pubs/ffr/>)
- Final Invention Statement ([PHS Form 568](#)) must be submitted whether there is an invention or not. Regina Janicki in the Office of Grant Support (regina.janicki@einsteinmed.org) completes this in eRA Commons. . If an invention is referenced in a grant close-out report, the PI should meet with OBBD to confirm invention disclosure has been reported to the government.
(NOTE: Regina coordinates with the Office of Biotechnology and Business Development (OBBD). Once the OBBD approves, then Regina submits the Final Invention Statement via eRA Commons).
- The PI needs to consider submitting the Progress Report to NIH as well.

If NOT NIH....

- Complete Relinquishing Letter per terms and conditions of the award and send to sponsor.
- Notify RF. RF will complete and submit the Financial Report/Invoice.

Education (if applicable)

- Meet with Belfer Institute and Graduate Office Administrations regarding future plans for students, thesis defense, re-assignment of mentors.
- If PI plans to remain engaged with Einstein students, thesis defense, mentoring or advisement, meet with Office of General Counsel.

Administrative Requirements

- Return lab coat Collect film badges
- Return Keys Collect ID Card and Submit to Security
- Clean out Office of Personal Items

Office of Biotechnology & Business Development

- Notify Office at biotech@einsteinmed.org
- If the plan is to transfer any materials, data, samples or protocols to a new institution, legal agreements are required.
- If the plan is to continue collaboration with Einstein while at new institution, a collaboration agreement is required.

Completed and Reviewed by:

Department Administrator Signature

Date

(Reminder: Please PDF and send copy of completed for to brian.pelowski@einsteinmed.org)