

## TRANSFER-IN CHECKLIST FOR INCOMING FACULTY WITH SPONSORED RESEARCH



Research Faculty Onboarding			
	Faculty signs offer letter		
	New Faculty Onboarding <a href="#">survey</a> Covers: Sponsored projects, COI, ACS/IACUC, IRB, MTAs, EH&S, Space, other research needs		
	1:1 Zoom welcome meeting(s)		
Date	Who is responsible	Days to complete	Action item
Sponsored Research - Grant Transfers to UF			
	PI	14	Faculty notified their prior institution
	PI	14	Faculty notified sponsor(s)
	PI	44	Sponsor and prior institution approve transfer
	UF Dept admin (UFDA)	14	Courtesy appointment / account created in UFirst
	PI / Prior institution Dept admin (PrDA)	44	Copy of original application is provided
	PI / PrDA	44	Copy of original <a href="#">NOA</a> is provided
	PI / PrDA	44	Replacement grant application provided
	PI / PrDA	44	Budget + Budget justification provided (reflecting \$\$ being transferred in)
	PI / PrDA	74	Final Research Progress Report / work statement ( <a href="#">RPPR</a> )
	PI / PrDA	74	Final invention statement ( <a href="#">FIS</a> )

	PI / PrDA	74	Prior institution provided Relinquishing statement
	PI / PrDA	74	Final Federal Financial Report ( <a href="#">FFR</a> )
	PI / PrDA		Other sponsor requests
	PI / UFDA	164	IACUC protocol approval
	PI / UFDA	164	IRB protocol approval
	UFDA / DSP	164	UF award activated
<b>Sponsored Research - Subawards to former institution</b>			
	PI / UFDA	164	Subawards completed (if applicable)
<b>Sponsored Research - IACUC</b>			
	PI / UF IACUC	164	Temporary <a href="#">protocol</a> activated (if applicable)
	PI / UF IACUC		Final protocol approved and activated
<b>Sponsored Research - IRB</b>			
	PI / UF IRB	164	<a href="#">Temporary</a> protocol activated (if applicable)
	PI / UF IRB		Final protocol approved and activated
<b>Compliance</b>			
	PI	74	Conflict of interest ( <a href="#">COI</a> ) certification completed
	PI / UF DSP / PrDA / Tech licensing	164	MTAs completed (if applicable)
<b>Research space assignment</b>			
	UFDA/Research affairs	74	Space <a href="#">request</a> approved
	Research affairs	74	Space reassignment notification sent out
	UFDA	119	Space vacated, EH&S closeout <a href="#">completed</a> , Assets closeout <a href="#">completed</a>
	UFDA / Research affairs	164	Space renovation completed
	UFDA / Research affairs	119	Temporary space assigned (if needed)
<b>Equipment transfers from previous institution</b>			
	PI / PrDA	119	Equipment transfer approved (if applicable)
	UFDA / Dept asset manager / PrDA	164	Equipment transferred to UF
<b>Animal transfers from previous institution</b>			
	PI / ACS	164	Animal <a href="#">transfer</a> approved (if applicable)
	PI / UFDA / PrDA / ACS	194	Animals transferred to UF
<b>Hazardous materials transfers from previous institution</b>			

	PI	119	EH&S <a href="#">transfer</a> approved (if applicable)
	PI / UFDA / PrDA / EH&S	194	Hazmat transferred to UF
<b>Lab setup commitments</b>			
	UFDA		Equipment commitments completed
<b>Graduate students and fellowships</b>			
	UFDA / Graduate school	119	Graduate students accepted to UF
	PI / UFDA / DSP / PrDA	164	Fellowships transferred to UF
<b>HR, visas, cohort hires</b>			
	UFDA / HR / International center	44	Visa documents submitted
	UFDA / HR	164	Positions approved and job postings created
<b>Other offer letter commitments</b>			
	UFDA / Research affairs	365	First year letter commitments completed

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**List of abbreviations:**

Principal Investigator (PI)

UF Departmental administrator (UFDA)

Prior institution Departmental administrator (PrDA)

UF Division of Sponsored Programs (DSP)

UF Institutional Animal Care and Use Committee <https://iacuc.ufl.edu/>

UF Institutional Review Board (UF IRB) <https://irb.ufl.edu/>

UF Technology Licensing | UF Innovate <https://innovate.research.ufl.edu/tech-licensing/>

UF Animal Care Services (ACS) <https://acs.ufl.edu/>

UF Environmental Health and Safety (EH&S) [UF | EHS \(ufl.edu\)](https://ehs.ufl.edu/)

UF Human Resources (HR) <https://hr.ufl.edu/manager-resources/recruitment-staffing/hiring-center/creating-a-uf-appointment/the-appointment-hiring-process/>

UF College of Medicine Research affairs [COMResearch-help@ufl.edu](mailto:COMResearch-help@ufl.edu) or <https://researchaffairs.med.ufl.edu/>