**Exit Checklist for Principal Investigators Leaving Montana State University**

1. The department head will notify The Office of Research Compliance (ORC) and Safety & Risk Management (SRM) upon receipt of principal investigator (PI) resignation from Montana State University (MSU).
2. The ORC will compile a list of any research protocols (e.g., IACUC, IBC, IRB, RSC).
3. A meeting with the PI, department head, fiscal manager, ORC, and Safety and Risk Management (SRM) will be held to discuss the close out of protocols and expectations for exiting the laboratory space. Please refer to the [SRM Lab Occupancy/Vacancy Policy](https://www.montana.edu/srm/chemicalsafety/msulaboratoryoccupancyvacancypolicy.html) as needed.
4. The checklist below will be filled in to track each item required of the PI.
5. If materials are being transferred to another institution, coordination with the appropriate Safety Officer and the Technology Transfer Office must be implemented.
6. A list of key contacts is found at the end of the checklist (e.g., Biosafety Officer, Chemical Safety Officer, etc.)

**PI Name:** **Insert PI Name Last Day at MSU:** Click or tap to enter a date.

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| **Office of Research Compliance** |
| 1) List of active ORC protocols.Enter protocol numbers or N/A | Is work outlined in the protocol(s) being transferred to another PI?[x] Yes [ ] No [ ] N/A | If ‘Yes’, which PI is taking over responsibility of the protocol(s)?Enter New PI NameProtocol amendment must be submitted by Insert Due Date to change PI. |
| If ‘No’, the protocol(s) must be inactivated and work on protocols must be stopped by Insert Due Date. |
| 2) Does the laboratory have biological materials?[ ] Yes [ ] No [ ] N/AIf yes, all biological materials must be destroyed or transferred to another MSU PI. | Destroyed By/Date:Method of destruction: | Transferred To/Date:  By/Date: |
| 3) An institution approved plan for disposition of animals is in place.[ ] Yes [ ] N/A | Plan approved by/date: |
| 4) PI access to controlled locations has been removed (e.g., ARC). | Access removed confirmed by/date: |
| 5) Will human research studies continue at a different institution?[ ] Yes [ ] No [ ] N/A | If ‘Yes,’ plan is in place to transfer protocol and all sensitive data to new institution. Confirmed by/date: | If ‘No,’ all IRB protocols are closed out and access to sensitive data has been removed. Confirmed by/date: |
| 6) RSO has been contacted regarding the proper disposition/transfer of radioactive materials.[ ] Yes [ ] N/A | RSO Signature/Date for disposition of RAM: |
| 7) Export Control Officer has been contacted regarding proper disposition of materials.[ ] Yes [ ] N/A | Export Control Officer Signature/Date: |

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| **Safety and Risk Management** |
| 1) Communication has been initiated between PI and SRM for disposition of chemicals.[ ] Yes [ ] No [ ] N/A | PI signature/date: |

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| **Office of Sponsored Programs (OSP)** |
| 1) Communication has been initiated between PI and Fiscal Manager.[ ] Yes [ ] No [ ] N/A | PI signature/date: |

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| **Technology Transfer Office (TTO)** |
| 1) Material Transfer Agreement is in place for all materials being transferred to another institution.[ ] Yes [ ] N/A | Materials are being transferred to:Transfer of materials has been approved by the relevant safety officer. Name/Date: |

**Key Contacts:**

**Office of Research Compliance**

*ORC Associate Vice President of Research Compliance:* Kirk Lubick, kirk.lubick@montana.edu 406-994-6998

*ORC Asst. Director, IACUC Program:* Lauren Cantamessa, lauren.cantamessa@montana.edu 406-994-6821

*IRB Administrator:* Brenna Szott, brenna.szott@montana.edu 406-994-4706

*Biosafety Officer:* Amy Robison, amanda.robison@montana.edu 406-994-6733

*Radiation Safety Officer:* Nick Childs, radiation@montana.edu 406-994-7317

*Export Control:* Quinton King, quinton.king@montana.edu 406-994-7795

*Conflict of Interest:* Daniella McGuire, daniella.mcguire@montana.edu 406-994-6551

**Safety and Risk Management**

*Chemical Safety Officer:* Ryan Brickman, ryan.brickman@montana.edu 406-994-7760

*Chemical Safety Specialist:* Cody Ragan, cody.ragan1@montana.edu 406-994-7589

*Chemical Safety Specialist:* Jessica Lusty Beech, jessicalustybeech@montana.edu 406-994-5095

*Hazardous Materials Manager:* Patrick Ryan, patrick.ryan6@montana.edu 406-994-7803

**Technology Transfer Office**

*Director:* Daniel Juliano, daniel.juliano@montana.edu 406-994-7483

**Office of Sponsored Programs**

Contact your Fiscal Manager

<https://www.montana.edu/research/osp/aboutus/fiscal_managers_by_org.html>