



## American Diabetes Association Research Programs Institutional Transfer Checklist

### STEP 1: Notify ADA

- Email notification of transfer to [grantadministration@diabetes.org](mailto:grantadministration@diabetes.org)

### STEP 2: Once Grant Administration is notified, the PI will receive an email with the link to his online grant management account. The PI will be asked to upload the following documents:

#### **Letter from the Chair at the new institution**

- Include confirmation of non-profit status
- Include support of PI's research
- Include available space and facilities
- Tax ID number for new institution
- Include contact information of new institution (address, phone, fax, email)

#### **Letter from PI**

- Include the date the PI will move
- Include new contact information (address, phone, fax, email)

#### **Contact information from the financial officer at the new institution (address, phone, fax, email)**

- Include the mailing address where payments will be remitted. If there are other ADA funded studies at one institution, all payments will be remitted to the same address.

#### **Cumulative final financial report from the former institution**

- Include refund of any unused grant money, which it to be forwarded to PI at new institution

### STEP 3: Award Acceptance

- A Transfer Letter will be emailed to the PI with an Award Acceptance Form attached
- To complete the transfer and officially reactivate the award, the PI will log into the online grant management account and upload the signed Award Acceptance Form from the new institution.

Please note that the award will be placed on hold until the transfer is complete. No payments will be made during this period. All refunds submitted from the former institution will be forwarded to the new institution on the PI's behalf. If there is a balance to be paid to the prior institution, it will be deducted from the next scheduled payment(s) to be paid to the new institution.

To expedite the process, verify that all information submitted to ADA is accurate. If you have any questions, please contact Research Programs staff by email at [grantadministration@diabetes.org](mailto:grantadministration@diabetes.org), or by phone at (703) 549-1500 x2260.

The Association wishes you continued success with your research.