PI/Mentor/Fellow Changes

When a PI/Mentor/Fellow (referred to as PI throughout the rest of the document) changes on a project, the change must be reflected in GMAS. In some cases, a new account(s) will be created in order to manage the change, and in other cases a new account(s) is not necessary. This document outlines all PI change scenarios.*

**This documentation does not cover scenarios where a PI has left Harvard and taken their project to another institution. That documentation will be covered under processes for a termination or subcontract.*

When the project is transferred from one PI to another:

When a project transfers from one PI to another it is called a **PI transfer**. There are two scenarios for a PI transfer:

1. The new PI will be responsible for all charges within the current segment (including those incurred prior to the PI change effective date).
    a. If the new PI is in the same department, **no new accounts need to be created**. The old PI's root will be replaced with the new PI's root in the existing account string. When the revision is committed, the new PI will show on the segment homepage (the old PI will still show on previous requests and old action memos).
    b. If the new PI is in a different department, this action turns into a tub or org remap. **New accounts will need to be created**. A revision will need to be done to change or create the tub (if necessary), org, fund (if the tub has changed), and root. The old accounts get closed out and all expenses are transferred to the new accounts which reflect the entire segment obligated dates. All funds will be reallocated to the new account(s).

2. The new PI will not be responsible for charges incurred within the current segment prior to the PI change effective date.
    a. If the new PI is in the same department, **new accounts need to be created**. A new account group will be created to capture all the new account information for the new PI with the start date of the account(s) reflecting the effective date of the PI transfer. The old account(s) end date will be changed to reflect the day before the new PI's effective date. Interim final figures will need to be determined in order to reallocate funds to the new account(s).
    b. If new PI is in a different department, this action turns into a tub or org remap. **New accounts will need to be created**. A revision will need to be done to change or create the tub (if necessary), org, fund (if the tub has changed), and root. The new account(s) will have a start date that reflects the PI transfer effective date. The old account(s) end date will be changed to reflect the day before the new PI's effective date. **Interim final figures will need to be determined in order to reallocate funds to the new account(s).**

Please note that in cases of **PI transfers**, the above processes are strong recommendations that we make to departments. Departments can decide to override existing accounts with new information, or create new accounts. The only piece here that is not flexible is when a tub/org remap is required, but the department can choose to use transfer effective dates on new accounts, or entire project periods.

When the project was set up under the wrong PI:

When a project was set-up under the wrong PI and needs to be corrected, it is called **a PI remap**.
The new PI will be responsible for all charges within the current segment (including those incurred prior to the PI remap).

- If the correct PI is in the same department, **no new accounts need to be created**. The incorrect PI's root will be replaced with the correct PI's root in the existing account string. When the revision is committed, the correct PI will show on the segment homepage (the incorrect PI will still show on previous requests and old action memos).
- If the correct PI is in a different department, this action turns into a tub or org remap. **New accounts will need to be created**. A revision will need to be done to change or create the tub (if necessary), org, fund (if the tub has changed), and root. The old accounts get closed out and all expenses are transferred to the new accounts which reflect the entire segment obligated dates. All funds will be reallocated to the new account(s).