



Refer to **section 3.4.4** in the [Manual of Operating Procedures](#) before initiating the process.

**Communication and Approvals**

**Enrolling site**

- Confirm participant's willingness to transfer to the receiving site
- Contact the receiving site PI to discuss participant transfer and timeline.
  - Receiving site** PI confirms site has resources for remaining study visits
    - Clinical and administrative personnel
    - MRI availability, biospecimen storage facilities
    - Other supplies
- Confirm the transfer agreement via email with the PI and the Coordinating Center (CC).

**Both enrolling and receiving sites**

- Follow site's IRB and regulatory requirements to transfer or receive the participant (Check with your institution for specific regulations.)
- Notify the CC of IRB approvals

**Enrolling site**

- Notify participant of 1) approved transfer 2) new study team's point of contact
- Share participant contact information with the receiving site and work with them to ensure the participant is fully informed and the transition is seamless (Use encrypted email or other HIPAA-compliant communication channel for sharing information.)

**Receiving site**

- Contact and consent the participant
- Notify the enrolling site and CC of the reconsent status via email and record in the Participant Transfer Form in the EDC

**Participant Data Management**

**Enrolling site**

- Close out outstanding data entry and queries
- Upload imaging files
- Record all biosamples associated with the participant
- Transfer participant source documents to the receiving site through secure file system
- Scan biosamples out of the virtual biorepository and ship participant biosamples to the receiving site (Visit [MarkVCID2 Protocols & Resources](#) > Biospecimen Collection Best Practices & Shipping Procedures dropdown menu > "Shipping Human Biospecimens Guideline" and "Biorepository Sample Tracking Instructions Manual")
- Initiate Participant Transfer Form in the EDC
  - Enrolling site ID, reason for request, last completed visit, next visit window date

**Receiving site**

- Complete Participant Transfer Form in EDC
  - Receiving site ID; confirm transfer of the participant ID in EDC, reconsent prior to transfer, and that research data records were received
- Receive shipment and scan biosamples into the virtual biorepository
- Schedule participant's next study visit