



Approaching the end of a PLEX Engagement?
Ensure to plan a meeting with your PLEX partner(s) well in advance to discuss the following:

PROCESSES

Activity	Scientist or Research Staff	PLEX	Resource
Evaluation	Complete evaluation of the process using the recommended tools and invite any other questions or comments PLEX may have	Complete the evaluation and share any other questions or comments	Toolkit Evaluation Pages 31-32
End of Project Discussion	Discuss what project aspects remain and next steps	Ask any questions regarding next steps	
Sharing Project Results	Share the project results with your PLEX partners in plain language		PLS resources 
Financial Compensation and Expense Reimbursements	Finalize compensation: Ensure all compensation or expense reimbursements processes are completed	If any financial compensation or expense reimbursement is outstanding notify the Scientist and/or Research Staff	Toolkit Compensation Pages 27-28
Storage and Data Retention	Adhere to storage and retention of de-identified research data according to UHN policies		Clinical Research Hub: Essential Document Templates 

Activity	Scientist or Research Staff	PLEX	Resource
Digital System Access	Remove PLEX partner system access: Email lists, shared drives, platforms, where applicable		
Opportunities for Process Improvement	Based on feedback identify opportunities for improvement on a go-forward basis and where appropriate share process improvements with the team	Provide feedback about the overall engagement process and ways the team could improve going forward	

MAINTAINING RELATIONSHIPS

Activity	Scientist or Research Staff	PLEX
Discuss Contributions and Impact	Highlight the PLEX partner contributions to date	
Formal Acknowledgement of Contributions	Confirm acknowledgement and authorship preferences for contributions	Discuss how you would like to be acknowledged for your contributions (e.g., listed as an author, biography included on a report)
Formal Recognition	Consider formal recognition (e.g., writing a thank you letter, certificate, acknowledgement in team meeting, social media post, etc.)	Discuss recognition preferences
Stay Connected	Discuss ways your PLEX partner(s) can stay connected with the project team and your field of research	Discuss how you would like to stay connected with the team and the field of research