

## Researcher Checklist

	Requirement	Format/Details	Contact
<u>Proposal Process</u>	Full Proposal & Reader's Guide	<ul style="list-style-type: none"> <li>▪ Review proposal guides, see <i>Policies and Procedures: General Information</i>, Appendix A</li> <li>▪ Review the Texas ERC fee schedule, see <i>Policies and Procedures: General Information</i>, Appendix B</li> <li>▪ Review the available Texas ERC Data Inventory, <a href="http://www.utaustinerc.org">http://www.utaustinerc.org</a>, Data tab</li> <li>▪ Complete the Reader's Guide and full proposal and submit to the Director <b>52 days prior</b> to the next ERC Advisory Board meeting</li> <li>▪ If needed, attach the supplemental data request form to the proposal, see <i>Policies and Procedures: General Information</i>, Appendix C (but wait to send forms until after approved)</li> </ul>	Director
	Attend the ERC Advisory Board Meeting	<ul style="list-style-type: none"> <li>▪ Director will approve proposal then schedule it for review on the ERC Advisory Board's calendar</li> <li>▪ Attend Advisory Board Meeting (via phone)</li> </ul>	
	ERC Advisory Board Approval Process	<ul style="list-style-type: none"> <li>▪ ERC Advisory Board reviews and approves, approves with amendments, requests a resubmit, or denies the proposal</li> </ul>	
<u>Obtaining Access</u>	Fees	<ul style="list-style-type: none"> <li>▪ Ensure fees for your ERC data access have been paid once invoice is received.</li> </ul>	ERC Admin
	Review Info	<ul style="list-style-type: none"> <li>▪ Review all info on our website for <a href="#">Researchers of Approved Projects</a>.</li> </ul>	
	UT EID	<ul style="list-style-type: none"> <li>▪ Obtain a <a href="#">UT EID</a> (if you don't have one already).</li> </ul>	
	ERC Researcher Agreement	<ul style="list-style-type: none"> <li>▪ Complete &amp; submit the <a href="#">ERC Researcher Agreement</a>.</li> <li>▪ This Agreement also serves as the way you specify preferred workstation locations, set a keypad access code, and provide a Google-compatible for the workspace scheduling calendar. Renew signed form annually.</li> </ul>	
	FERPA Training	<ul style="list-style-type: none"> <li>▪ Complete <a href="#">FERPA training</a>, submit proof to ERC in form of a screenshot. Due every two years.</li> </ul>	
	Masking Training	<ul style="list-style-type: none"> <li>▪ Complete the required <a href="#">Masking Training &amp; Assessment</a>.</li> </ul>	
	IRB Approval	<ul style="list-style-type: none"> <li>▪ Obtain IRB approval if your institution or organization requires IRB for execution of research; complete &amp; submit the IRB Certification/Exemption <a href="#">Form</a>.</li> </ul>	
	File Request	<ul style="list-style-type: none"> <li>▪ Using the <b>Data Table Template</b> (first tab in the <a href="#">Data Inventory</a> on the ERC website), email Director and ERC Admin the list of data files you will need for your research. Files requested <u>must align</u> with the original data request set forth in the approved proposal.</li> </ul>	Director & ERC Admin
	Calendars	<ul style="list-style-type: none"> <li>▪ Ensure you've been added to the ERC Google Calendars for room/workstation scheduling.</li> </ul>	ERC Admin
UT ID Card	<ul style="list-style-type: none"> <li>▪ If applicable/needed: follow the steps to obtain a <a href="#">UT ID card</a> (for building/workstation access). Not every researcher will need an ID card; check workstation hours/times.</li> </ul>		

<b>Conducting Research</b>	FERPA Training	<ul style="list-style-type: none"> <li>If your training expires mid-project, proof must be resubmitted. Note: Valid for two years</li> </ul>	ERC Admin.
	Masking	<ul style="list-style-type: none"> <li>Review the <i>Policies &amp; Procedures for Approved Projects, Masking Guidelines &amp; Techniques</i> for details on how to properly mask your data for FERPA compliance</li> </ul>	
	Review of Research Products	<ul style="list-style-type: none"> <li>Review the <i>Policies &amp; Procedures for Approved Projects, Review of Research Products</i> for details on how the process works</li> <li>Submit research products for review to the Director up to 7 days to review and release if properly masked</li> </ul>	Director
	Information Updates	<ul style="list-style-type: none"> <li>Submit periodic updates to the Director reporting the progress and any external publications derived from the Repository data</li> </ul>	
	Project Extension or Change	<ul style="list-style-type: none"> <li>If needed, submit to the Director 52 days prior to the next ERC Advisory Board meeting, see <i>Policies &amp; Procedures for Approved Projects, Appendix E</i></li> </ul>	
	Request for Project Data Amendment	<ul style="list-style-type: none"> <li>If needed, submit to the Director 52 days prior to the next ERC Advisory Board meeting, see <i>Policies &amp; Procedures for Approved Projects, Appendix F</i></li> </ul>	
	Researcher Changes	<ul style="list-style-type: none"> <li>If changing, adding or deleting researchers from your project, let the Director know ASAP. Fees cover two researchers per project, per year; if additional researchers are needed, extra fees may be charged per our policies.</li> </ul>	
<b>Conclusion of Research</b>	Request for Revise & Resubmit access	<ul style="list-style-type: none"> <li>If needed, submit a request in writing via email to the ERC Director of your need for additional access time (if beyond your project end date) to Revise &amp; Resubmit. Include the actual documentation from the publishing journal/source asking you to R&amp;R. The minimum amount of time we can invoice/bill for this additional access is 3 months/quarterly.</li> </ul>	Director
	Dissemination Strategy	<ul style="list-style-type: none"> <li>Policy Brief– <b>Within 60 days of the project end date</b>, submit the state-required policy or practice brief highlighting the findings of your study for review by the ERC Advisory Board, Director, and possible posting on the website</li> <li>Complete any other dissemination obligations outlined in the proposal and submit copies of publications</li> </ul>	
	Researcher Access & Files	<ul style="list-style-type: none"> <li>Notify the Director &amp; ERC Admin of the impending conclusion of your research</li> <li>Access is rescinded</li> <li>Researcher folders/workspace files will be archived and data files will be destroyed following the completion of the project.</li> <li>Project statistical code will be stored in <i>Code to Archive</i> folders for a limited amount of time by the ERC.</li> </ul>	