

## Researcher Checklist

	Requirement	Format/Details	Contact
<b>Proposal Process</b>	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.utaustiner.org">http://www.utaustiner.org</a>, Data tab</li> <li>▪ Complete the Reader's Guide and full proposal and submit to the Director approximately 35 days prior to the next ERC Advisory Board meeting (see exact deadline on ERC website)</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>	
<b>Obtaining Access</b>	Fees/Payment	<ul style="list-style-type: none"> <li>▪ Ensure fees for your ERC data access have been paid once invoice is received. Data access cannot be granted until fees are paid in full.</li> </ul>	ERC Admin
	Review Info	<ul style="list-style-type: none"> <li>▪ Review all info on our website for <b>Researchers of Approved Projects.</b></li> </ul>	
	UT EID & TACC ID	<ul style="list-style-type: none"> <li>▪ Obtain a <a href="#">UT EID</a> (if you don't have one already) &amp; a TACC ID.</li> </ul>	
	ERC Researcher Agreement	<ul style="list-style-type: none"> <li>▪ Complete &amp; submit the <b>ERC Researcher Agreement</b>.</li> <li>▪ This Agreement also serves as the way you specify preferred workstation locations, are assigned a keypad access code, and provide a Google-compatible email for the workspace scheduling calendar. Renew signed form annually.</li> </ul>	
	FERPA Training	<ul style="list-style-type: none"> <li>▪ Complete <b>FERPA training</b>, 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 <b>Masking Training &amp; Assessment</b>.</li> </ul>	
	New User Assessment	<ul style="list-style-type: none"> <li>▪ Assessment to be completed after reviewing/studying the <i>Policies &amp; Procedures for Approved Researchers</i> and the <i>Understanding Your Access</i> documents</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 Form.</li> </ul>	
	File Request	<ul style="list-style-type: none"> <li>▪ Using the <b>Data Table Template</b> (first tab in the Data Inventory 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 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 requests for FERPA review via questionnaire at: <a href="https://utexas.qualtrics.com/jfe/form/SV_6gskQb6V8ZZ4atn">https://utexas.qualtrics.com/jfe/form/SV_6gskQb6V8ZZ4atn</a>; allow 7-10 work days to review &amp; 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 Director ~ <b>35 days prior</b> to the next ERC Advisory Board meeting (see exact deadline on ERC website), see <i>Policies &amp; Procedures for Approved Projects, Appendix E</i>. Requests for Revise &amp; Resubmit should use this Extension request process.</li> </ul>	
	Request for Project Data Amendment	<ul style="list-style-type: none"> <li>If needed, ~ <b>35 days prior</b> to the next ERC Advisory Board meeting (see exact deadline on ERC website), 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 ERC Admin know ASAP. Fees cover two researchers per project, per year; if additional researchers are needed (up to 4 per project max), extra fees may be charged per policies.</li> </ul>	Director & ERC Admin
<b>Conclusion of Research</b>	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>	Director & ERC Admin
	Researcher Access & Files	<ul style="list-style-type: none"> <li>Notify the Director, ERC Admin &amp; IT Coordinator 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>	Director, ERC Admin, IT Coord