

## 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></li> <li>▪ Review the Texas ERC fee schedule, see <i>Policies and Procedures: General Information</i></li> <li>▪ Review the available Texas ERC Data Inventory on ERC website</li> <li>▪ Complete the Reader's Guide and full proposal and submit to the Director</li> <li>▪ If needed, follow instructions for supplemental data request, see <i>Policies and Procedures: General Information</i></li> <li>▪ Ensure you have funding in place to pay fees if project approved</li> </ul>	Director
	Attend the ERC Advisory Board Meeting via Phone	<ul style="list-style-type: none"> <li>▪ Director will review/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 either 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.</li> </ul>	ERC Admin
	Review Info	<ul style="list-style-type: none"> <li>▪ Review all info on our website for Researchers of Approved Projects.</li> </ul>	
	UT EID & TACC ID	<ul style="list-style-type: none"> <li>▪ Onsite researchers only: Obtain a <a href="#">UT EID</a> (if you don't have one already)</li> <li>▪ All researchers: obtain a TACC ID (instructions to be sent with onboarding steps).</li> </ul>	
	ERC Researcher Agreement	<ul style="list-style-type: none"> <li>▪ Complete &amp; submit the ERC Researcher Agreement. Different versions available for either Remote or Onsite access.</li> </ul>	
	FERPA Training	<ul style="list-style-type: none"> <li>▪ Complete FERPA training, 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 Masking Training &amp; Assessment.</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 (found on ERC website).</li> </ul>	
	File Request	<ul style="list-style-type: none"> <li>▪ Using the Data Table Template (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 must align with the original data request set forth in the approved proposal.</li> </ul>	Director & ERC Admin
	ERC Google Calendar	<ul style="list-style-type: none"> <li>▪ Ensure you've been added to the ERC Google Calendar for access scheduling.</li> </ul>	ERC Admin
UT ID Card	<ul style="list-style-type: none"> <li>▪ If applicable/needed for in-person research only: 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 building hours/times.</li> </ul>	ERC Admin	

<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 business 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 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 also 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), additional 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. 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