Appendix A

Researcher Checklist

1. **Obtaining Access**
   a. **Credentials/CougarNet ID**
      i. **CougarNet.** If not part of the UH System, see UH CougarNet ID ePerson of Interest Process to set up your credentials for access. See http://www.uh.edu/infotech/services/accounts/sponsored/procedure/
      ii. **Cougar Card.** Research workstation access is controlled via Cougar Card swipes. Card information can be found here: http://www.uh.edu/af-university-services/cougarcard/.
   b. **IRB Approval**
      i. Submit evidence of IRB approval or justification for exemption by email to the Director & Database Administrator, see *Policies & Procedures: Approved Project Handbook*, Appendix C
   c. **FERPA Training**
      i. Complete and send a screen shot of FERPA training by email to the Director & Database Administrator
         1. https://apps.missouristate.edu/human/training/ferpatraining/welcome.htm
   d. **Masking Training Module**
      i. Complete Masking Training Module & Assessment Certify completion of the UH ERC Masking Training
      ii. Submit Training Module & Online Assessment results to the Director & Database Administrator by email
   e. **Confidentiality Agreement**
      i. Review, complete, and submit the Confidentiality Agreement to the Database Administrator and Director, see *Policies & Procedures:*

Approved Project Handbook, Appendix B

     ii. Confidentiality Agreement also serves as the way you request a preferred workstation location, set a keypad access code, and provides information for the workspace scheduling calendar, see *Policies & Approved Project Handbook*

f. Schedule Workstation Time

     i. Access the online booking app from the UH ERC website http://www.uh.edu/education/research/institutes-centers/erc/

g. File Request

     i. Formally request data outlined and approved in your proposal, include the preferred format (e.g. SPSS, STATA, SAS, text)

h. Confidentiality Agreement

     i. Renew annually and submit by email to the Director & Database Administrator

i. FERPA Training

     i. If your training expires mid-project, proof must be resubmitted. Note: Valid for two years

2. Conducting Research

  a. Masking

     i. Review the *Policies & Procedures: Approved Project Handbook*, *Masking Guidelines & Techniques* for details on how to properly mask your data for FERPA compliance

  b. Review of Research Products

     i. Review the *Policies & Procedures: Approved Project Handbook*, *Review of Research Products* for details on how the process works

     ii. Submit research products for review to the Director, up to 7 days to review and release if properly masked

  c. Information Updates

     i. Submit periodic updates to the Director reporting the progress and any

external publications derived from the Repository data

    d. Project Extension or Amendment

        i. If needed, submit to the Director 60 days prior to the next ERC Advisory Board meeting, see *Policies & Procedures: Approved Project Handbook*, Appendix E

        ii. If approved, a new Confidentiality Agreement is needed.

    e. Dissemination Strategy

        i. Policy Brief– Submit a policy or practice brief highlighting the findings of your study for review by the ERC Advisory Board, Director, and possible posting on the website

        ii. Complete any other dissemination promises outlined in the proposal and submit copies of publications

3. Conclusion of Research

    a. Researcher Access & Files

        i. Notify the Director & Database Administrator of the conclusion of your research

        ii. Access is rescinded

        iii. Researcher folders/workspace files will be archived   and destroyed five years after completion