Heller School for Social Policy and Management

Principal Investigator (PI) Checklist

Following is a checklist that a Principal Investigator (PI) of any research project can use to ensure that he/she has completed all the steps necessary to bring a new research project into Heller.

If you have secondary data (e.g. claims data):

1. Submit copy of DUA to Debbie DeWolfe. _____
2. Complete IRB and submit to ORA. _____
3. Talk to Elaine Kennen to get the 6 digit Chartstring for your project. This will be the project identifier. _____
4. Provide a list of people (e.g. researchers, partners, etc.) with access to the research information or facility to Debbie DeWolfe with relevant signature addendum. _____

5. If remote access to the research information is required, notify David Reynolds (via email at reynolds@brandeis.edu) to set this up. Email should include:
   a. 6-digit chartstring
   b. Authorized users with email and phone number
   c. Brief description of data and security needs _____
6. When the data arrive:
   a. Fill out Chain of Custody form (COC) and log the data into the secure physical location.
   b. If you would like to load the data yourself, use sFTP and make sure that there are no copies in an unsecure location.
   c. If your data are large or you would like help, please contact David Reynolds (email reynolds@brandeis.edu) _____
7. Do you need backup for your work? If so, please contact David Reynolds (email reynolds@brandeis.edu). _____

If your research protocol includes the collection of original data:

1. Complete IRB and submit to ORA. _____
2. Talk to Elaine Kennen to get the 6 digit Chartstring for your project. This will be the project identifier. _____
3. Use sFTP to load data into secure environment.
4. If you need help, please contact David Reynolds (email reynolds@brandeis.edu) _____
5. Do you need backup for your work? If so, please contact David Reynolds (email reynolds@brandeis.edu). _____

As of November 18, 2013