Policies, plans, and guidelines

- Review your Data Management Plan (DMP)

- Review relevant policies:
  - Your funder’s expectations and requirements for research data
  - Local data retention policies, if applicable

- Establish guidelines regarding data ownership, if not already specified by your funder and/or participating institution/s

- If you will work with sensitive or personal data:
  - Ensure the ethical, legal, and privacy considerations addressed in your IRB approved plan and participant consent are in sync with your data storage and sharing plans
  - Ensure that your plan for sharing your data was included in your IRB application, and is included in any informed consent forms you'll provide to research subjects
  - Submit amended protocol and consent form to IRB as needed

Prepare for data storage and backup

- Estimate how much data will be produced
- Identify where data will be stored and backed up (e.g., computers, external hard drives, cloud services, options provided by Research Computing)
  - A general rule is to keep at least three separate copies of your files, of which:
    - One copy is in a separate geographic location
    - One copy is local (non-cloud based)
- Evaluate plans for safeguarding storage of data while your research is in progress (e.g. Where will lab notebooks be kept? Will paper files and/or hard drives need to be locked away when not in use?)
- Ensure that storage options, protocols, and mechanisms are in place before starting work

Need help getting started? Contact us for a research data management consultation.

Checklist adapted from NCSU Libraries