

**Project Checklist**

This is a tool to help researchers navigate the various steps and processes required to get a research study up and running within the Department of Pediatrics at the University of Calgary.

Please note that this list may not include each step of your study and not every step listed applies to all studies. For more information about each of the items below, contact the Sr. Consultant, Child Health Research.

Study lifestage	Process	Activities	Support available/Process information	Type of study					
				Investigator initiated, internally funded	Investigator initiated, grant funded	Investigator initiated, industry funded	Investigator initiated, unfunded/in-kind	Industry initiated, industry funded	
Concept & development	Protocol development	Methodologic & statistical consultation	<a href="#">Dept. of Peds Research Methods Team</a>	x	x	x	x		
		Analysis planning & conduct	<a href="#">ACHRI/Dept. of Peds Biostatistician</a>	x	x	x	x		
	Data access/management	Project feasibility & design	<a href="#">Dept. of Peds Sr. Consultant, Child Health Research</a>	x	x	x	x		
		Protocol review for administrative approvals	<a href="#">AHS Research Facilitation</a>	x	x	x	x	x	
Grants & funding	Funding opportunities	Methodologic, statistical & KT support	<a href="#">AB SPOR Support Unit</a>	x	x	x	x	x	
		Find funding opportunities	<a href="#">UCalgary funding database</a>		x	x			
		Get funding opportunity updates	<a href="#">Subscribe to CSM research communications mailing list</a>	x	x	x			
		Check internal processes and deadlines	<a href="#">Research Services, Grants &amp; Awards division, funding database and deadline calendar</a>	x	x	x	x		
		Grant development & application support	<a href="#">Dept. of Peds Program Manager/CSM Research Facilitator &amp; Grant Development Coordinator</a>	x	x	x			
		Internal peer review	<a href="#">CSM Research Facilitator/Research institutes</a>	x	x	x			
	Project set-up	Funding notification	Research Funding Application Approval Form	<a href="#">Research Services link to RFAA form</a>	x	x	x		
			UCalgary grant administrative review	<a href="#">Research Services submission tool</a>	x	x	x		
		Contracts & agreements	Notify Research Services of successful grant	<a href="#">Research Services Grant &amp; Awards Division</a>		x	x		
			Complete Project Request Form	<a href="#">Research Accounting Project-Request Form</a>	x				
Confidentiality disclosure agreement	<a href="#">CSM Legal portal</a>				x		x		
Clinical trial agreement	<a href="#">CSM Legal portal</a>				x		x		
Sub-site agreement	<a href="#">CSM Legal portal</a>		x	x	x		x		
Data transfer agreement	<a href="#">CSM Legal portal</a>		x	x	x		x		
Operations	Ethics	Material transfer agreement	<a href="#">CSM Legal portal</a>	x	x	x		x	
		Fund transfers	<a href="#">Research Accounting</a>	x					
	AHS Approval	IRISS submission to REB	<a href="#">IRISS homepage</a>	x	x	x	x	x	
		Dept. Approval Form	<a href="#">Dept. Approval Form (ethics)</a>	x	x	x	x	x	
	Registration	Data Disclosure Agreement	<a href="#">AHS Research Administration</a>	x	x	x	x	x	
		AHS IT systems access	<a href="#">AHS Research Administration</a>	x	x	x	x	x	
	HR processes	Operational approvals	Operational approvals	<a href="#">AHS Research Administration</a>	x	x	x	x	x
			Clinical Trials Registration (clinicaltrials.gov)	<a href="#">Calgary Centre for Clinical Research (Ucalgary)</a>	x	x	x		x
		Recruit trainees	Health Canada Regulatory Approval	<a href="#">Quality &amp; Assurance Regulatory Compliance Specialist</a>	x	x	x		
			Biosafety approval	<a href="#">Ethics &amp; Compliance - Biosafety</a>	x	x	x	x	x
Hire PT or FT research staff			<a href="#">Human Resources - hiring research staff</a>	x	x	x	x	x	
Hire casual (hourly) staff			<a href="#">Human Resources - hiring research staff (hourly)</a>	x	x	x	x	x	
Hire a student (student employment)			<a href="#">Human Resources - grad student employment</a>	x	x	x	x	x	
On-board research staff (ACH specific)			<a href="#">Dept. of Pediatrics Research On-boarding</a>	x	x	x	x	x	
Finance & reporting	Undergraduate student funding opportunities	Undergraduate student funding opportunities	<a href="#">Ucalgary undergraduate funding</a>	x	x	x	x	x	
		Get undergraduate student help	<a href="#">BHSc program</a>	x	x	x	x	x	
		Graduate student funding opportunities	<a href="#">Graduate awards database</a>	x	x	x	x	x	
		Set-up graduate student supervisor funding	<a href="#">Graduate Science Education - Supervisor resources</a>	x	x	x	x	x	
	Post-Doc/Fellow funding opportunities	Post-Doc/Fellow funding opportunities	<a href="#">Post-doc funding database and deadline calendar</a>	x	x	x	x	x	
		eFIN delegation	<a href="#">eFIN project delegation job aid</a>	x	x	x	x	x	
		PeopleSoft delegation	<a href="#">Delegation of HR approvals</a>	x	x	x	x	x	
		UCalgary credit cards	<a href="#">Ucalgary Purchasing &amp; Travel cards</a>	x	x	x	x	x	
		Order equipment	<a href="#">Ucalgary Supply Chain Management</a>	x	x	x	x	x	
		Project account extensions	<a href="#">Ucalgary Research Accounting</a>	x	x	x		x	
Training	Graduate student skill development	<a href="#">Ucalgary My GradSkills program</a>	x	x	x	x	x		
	Research staff training	<a href="#">Training for Research Staff (Dept. of Pediatrics)</a>	x	x	x	x	x		
	Pediatric Research Building Blocks	<a href="#">View past presentations</a>	x	x	x	x	x		
	Health Research Platform Lunch & Learn	<a href="#">View Presentations</a>	x	x	x	x	x		
Ethics	Protocol modifications	<a href="#">IRISS Modify Your Study job aid</a>	x	x	x	x	x		
	Serious Adverse Event reporting	<a href="#">IRISS Reportable Event job aid</a>	x	x	x	x	x		
	Annual Reporting	<a href="#">CHREB Annual Renewal job aid</a>	x	x	x	x	x		
Study closeout	Ethics	Close study	<a href="#">IRISS homepage</a>	x	x	x	x	x	
	Registration	Project closures	<a href="#">Calgary Centre for Clinical Research (Ucalgary)</a>	x	x	x		x	
	Archiving	Archive records	<a href="#">Ucalgary Archives &amp; Information Management</a>	x	x	x	x	x	