**Office of Academic Computing (OAC)**

**Protocol Start-up Checklist**

**Pre-Grant Submission Budget Request Meeting**

* Prior to grant submission, please include OAC services on Planning to Submit form (by checking “Yes” to “Use of Custom Applications”. A Project Manager will set up a Pre-Budget Request meeting with Jack Doman and OAC team members to discuss the study needs and review the budget, scope and milestone timeline for study start and obtain budget estimate. Please allow 1-2 weeks for the budget estimate turnaround time. A recommended timeframe for the ensuing kick-off meeting will be provided.
  + Please complete the Project Initiation Pre-Charter form and provide the OAC with a copy of the to-be-submitted IRB protocol document.
  + Confirm with the OAC if the submission is anticipated to be a consented study.
  + K awardees – please note that budget estimates will need to be reviewed with department heads to ensure that supplemental funding may be available to help support OAC costs.

**Post-Award Kick-off Meeting**

* Upon funding notification, reach out to Project Manager to arrange a Kick-Off meeting if you have not already been contacted. Please note that this meeting should take place within the recommended timeframe prior to study start (e.g., At least 3-6 months prior to needing a participant-ready system/product).
  + Expand upon deliverables and identify “must haves” vs. “like to haves”
  + Prioritize deliverables
  + Review OAC project management practices
    - Development of Project Charter document to outline project specifics and deliverables (inclusive of budget and targeted milestones)
    - Establishment of Project Backlog
    - Establish a communication plan for meetings and reporting in addition to set-up of MS Teams site to promote efficient communication and document sharing
    - Frequency and type of status reporting
    - Ongoing retrospectives will be conducted as part of select Sprint Demo/Review meetings to gather and incorporate Lessons Learned, as a forum to discuss parts of the process the project team would like to continue with, or any areas for improvement or changes
    - Change Management procedures
    - Project Hand-Off/Closeout
  + Address budget questions and work with the Office of Grants and Contracts to establish a subcontract when warranted for departments outside of the Department of Psychiatry
  + Please note that the OAC Director is the point of contact for the following scenarios:
    - Presenting a plan for salary support (who, when, the percentages and estimated funding) for OAC and PMO staff as soon as the grant years are defined
    - Sending requests for salary distribution changes to the Grants Office in a timely manner
    - Answering any questions regarding OAC and PMO staff salary support
* The PI needs to supply the OAC Director with the grant years and account numbers as soon as they are known. They also need to provide the budgeted staff salary support for all years.

**Change Management**

Please note that in the event of a modification that changes the scope or schedule of the original project (i.e. number of assessments needed in WDX, change in application platform, data scoring methodologies, timeline for completion etc.), the exact nature of the request will need to be reviewed by the Project Manager in conjunction with OAC personnel to determine if a notable impact to the scope and thereby budget is expected.

* Please submit any testing feedback, change requests, or issues, as follows by using the [OAC HELP portal](https://research.psychiatry.upmc.com/oac_help/). This will be utilized during both the active development and ongoing maintenance phases of the project
* Change requests will be reviewed by OAC and Project Management personnel for impact to scope, budget and schedule. Depending on complexity change requests may take up to two weeks to review for approval
* Upon approval, accompanying documentation will be updated accordingly. This may include modifications to budget and schedule

**Project Hand-Off/Closeout**

A Project Acceptance Letter will be provided to the PI for an approval signature along with a Project Satisfaction Survey available via WDX for investigators and protocol staff to complete (within one-month of project hand-off) and share their feedback on how the project was planned, managed, and executed.

As part of the hand-off/closeout process, investigators and protocol staff will be instructed to continue to utilize the [OAC HELP portal](https://research.psychiatry.upmc.com/oac_help/) for ongoing maintenance requests for the duration of the grant. A triage programmer will be monitoring the system during daylight business hours to most efficiently assist and address or re-assign. Permission-related requests should be emailed to [oac@upmc.edu](mailto:oac@upmc.edu) or directed to the UPMC Help Desk (412-647-4357).