

Here is a packet of information and instructions we have put together for reference as you prepare your **renewal** application for the Add Health Restricted-Use data.

### Contact us

- Add Health Contracts email: [Add Health Contracts](#)
- Add Health website: [Add Health Contracts Website](#)

### Log in to the CPC Data Portal

- If you have not yet connected to your application using the link in the email from the Portal, here are the instructions:
  - Click on the link in the email to get to the Portal.  
**NOTE: THIS LINK IS GOOD FOR JUST ONE LOGIN.** If you need to attempt initial connection again, please email Add Health Contracts for a new link: [Add Health Contracts](#).
  - Log in to the Portal using your Institution's email or Microsoft Account.
- If you have already made initial connection to your application, use this link:
  - [CPC Data Portal](#)

### Pieces of the application

- After logging in to the Portal, click the Application tab.
- You will see the list of requirements and links to the sections.
- For each requirement:
  - Download the required document
  - Fill it out and sign it digitally (or on paper and scan it)
  - Upload it back to the appropriate tab
- There is no need to wait until you have all the pieces ready before beginning to upload what you have.
- In particular, if you send the Add Health Investigator Information and the Add Health Sensitive Data Security Plan, we can start the Security Plan review process immediately.

### Investigator Information Page

- Please fill out completely.

### Investigator and Institutional Signatures (last page of DUA)

- The PI fills out and signs their portion of the page titled "Investigator and Institutional Signatures."
- The Institutional Representative fills out and signs their portion of that page.
  - The "Institutional Representative" must be someone who is legally authorized to enter into contractual agreements on behalf of the University.
  - This is often not someone within the department; however, this role varies by institution.

**Note:** Some institutions will not sign until UNC has approved the contract; some will not allow the PI to sign before that either.

- If your institution will not sign until UNC has approved the contract, we will send you a partially-executed contract once it has been approved and UNC has signed. You will return the contract to us signed by your institution.

## Sensitive Data Security Plan (Attachment A) – all

There are three configuration options, described on the information sheet.

- **Note that some options previously available are no longer offered.**
- Download the information sheet from the Portal.
- The information sheet has links to the three forms (you will choose *one*).

The following points apply to all three Security Plan options:

- In the box labeled "List below the name(s) and responsibilities of the investigator(s) and the research staff..."
  - List specific names and a brief description of what they will do (e.g., programmer, mentor, researcher).
- System Administrator
  - The Add Health security administrator requires that you consult an IT professional.
  - Please list the name and contact information of the IT staff.
- Security Pledges -- Required for PI, other Researchers, Collaborators, IT staff
- Strong passwords
  - Add Health recommends the password be at least 16 characters long
  - A password of 16 or more characters should be changed annually.

### Data Stored on a Server

- **Please note:** We are asking for a *description* of what your system looks like; not all protocols are necessarily required. If you have questions, please contact us.
- **II.1.** Type of server/operating system
  - Check just one, and be specific with version
- **II.2.** Security Pledges -- see above
- **II.9.** Hard copy handling
  - Please check the first three boxes to acknowledge and agree.
  - If you are handling the hard copy differently, reply to "Other, Specify."
- **II.10.** Storage Unit -- for example, locked file cabinet, locked drawer, safe
- III and IV
  - For some entries, further information is requested in the box on the left; please reply

### Data Stored on a Stand-Alone Computer

- **I.2.** Security Pledges – see above
- **II.1.** Type of hardware – include whether this is a laptop or desktop
- **II.3.** Please check both boxes to acknowledge and agree.
- **II.8.** Handling hard copy data
  - This question continues onto the next page.
  - Please check all three boxes to acknowledge and agree.
- **II.9.** Storage Unit -- for example, locked file cabinet, locked drawer, safe
- **III.2.** Strong passwords – see above for guidelines and recommendations
- **III.6.** Secure erasure program – This question continues onto the next page.

### Data Stored on an External Hard Drive

- **I.2.** Security Pledges -- see above
- **II.1.** Type of hardware -- include whether this is a laptop or desktop
- **II.3.** Please check both boxes to acknowledge and agree.
- **II.8.** Handling hard copy data
  - Please check all three boxes to acknowledge and agree.
- **II.10 & II.11.** Storage Unit -- for example, locked file cabinet, locked drawer, safe
- **Controlling Access to the Data #5:** Location of secured directory
  - Please specify the full path name.

## Data Request and Justification

- Requesting additional data?
  - See the button on your Portal application “Request More Data.”
  - Add any additional datasets, go to Cart at the top of the page, follows steps through “submit.”
- **Justification**
  - If you are requesting additional data:
    - Download the form from the Justification requirement.
    - Fill out all parts of the form.
    - Upload the completed form.
  - If you are *not* requesting additional data:
    - Add Health will email a copy of the form to you.
    - Fill out just the top (including shipping information).
    - Submit by emailing the form to [Add Health Contracts](#).

## Supplemental Agreement (Attachment C)

- All researchers except the PI should be listed on the form and should sign it.
- Up to six researchers can be listed on one form, or you can submit a form for each.
- If there are no researchers accessing the Add Health data, please write “no researchers” on the upper line.
- The PI signs and dates each Attachment C at the bottom of the form.

## Security Pledge (Attachment D)

- Each person listed on the contract (including the PI), as well as IT staff and officemates, must sign a Security Pledge.
- You will see in the file you will download from the CPC Data Portal that there are four separate pledges:
  - one for Researcher (PI and all who will access the Add Health data)
  - one for IT staff
  - one for Collaborator (consulting on the project but not accessing the Add Health data directly)
  - one for Officemate
- Please copy as needed for additional users.
- Some of the forms ask for "Location" – this is asking for the location where the researcher will actually be doing their work, not the location where the data is stored.
- "Location," if it is on the form, is required.
- The email address is optional.

### Add Health Data Processing Fee

- There is no processing fee to renew.
- There is nothing for you to upload to this requirement.
- If you are requesting Wave V and/or dbGaP, Add Health will upload an invoice.
- Payment can be made at any time, but must be received before data can be sent.
- Payment can be by check or money order (your personal check or from your institution) or by credit card.
- To pay by check:
  - Check must be made payable to University of North Carolina at Chapel Hill.
  - Mail check to:  
Add Health Contracts  
The University of North Carolina at Chapel Hill  
Carolina Population Center  
Carolina Square, Suite 210  
123 West Franklin Street  
Chapel Hill, NC 27516
- To pay by credit card
  - Email your request to [Add Health Contracts](#).
  - ***Please do not send credit card information to Add Health.***

### Add Health IRB approval letter

- Must have an expiration date and/or specification of EXEMPT.
- Only one is required (not for every researcher); the PI for the Add Health contract must appear in this letter, though not necessarily as the primary investigator of the IRB-approved project.
- Add Health does not require annual review by your IRB; the requirement is for a current approval letter.

### Annual Report

- The form for submitting your annual report can be downloaded from: [Add Health Annual Report Form](#).
- Email the Annual Report to [Add Health Contracts](#).