

Research data handoff plan

Assign an owner, location, access decision, and release plan to each research output.

Use and limits. Operational preparation, not a funder-compliant application form or legal advice. NIH requires its 2026 DMS Plan format. Use the current official form and your institution's approvals for submissions.

WORKED EXAMPLE · FICTIONAL

Fictional project: a non-human laboratory imaging study. Human-participant data would require a separate consent, privacy, and access assessment.

1. Outputs and formats

TIFF microscope images, CSV measurements, R scripts, and README files. Estimated raw volume: 120 GB. Retain raw images and code; mark disposable intermediate files.

3. Active storage and recovery

Institution-managed project drive; analysts can edit, collaborators can read. The data steward owns weekly recovery checks; last test restore: 2026-09-08 (fictional).

5. Repository and release

Compare repositories that accept the image formats and volume. Confirm retention and costs; align deposit and release dates with applicable journal and funder instructions.

2. Documentation and provenance

One sample ID links image and measurement records. Record calibration, exclusion reasons, script version, and units in the data dictionary.

4. Rights and access decision

No human-participant data anticipated. Check collaborator agreements and image rights before selecting a public license; escalate uncertainty to the research office.

6. Owner, budget, and review trigger

PI approves scope and costs; data steward documents and deposits outputs. Review on 2026-10-01 and after protocol changes. Successor: lab manager if the steward leaves.

SOURCE GUIDANCE · CHECKED 2026-09-11

[NIH: Writing a DMS Plan](#). Current NIH format and data-sharing planning requirements. This worksheet is not that form.
<https://grants.nih.gov/policy-and-compliance/policy-topics/sharing-policies/dms/writing-dms-plan>

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[Online worksheet and current version](#) · [Corrections](#)
<https://manusights.com/resources/research-data-management-plan#worksheet>

Research data handoff plan

Project / date: _____

Keep completed copies private when they contain unpublished work. Use the online version for longer notes.

1. Outputs and formats

List raw data, derived tables, code, and documentation. Estimate volume and distinguish what must be retained.

2. Documentation and provenance

Specify identifiers, units, file names, software versions, and the information needed to reproduce processing.

3. Active storage and recovery

Name approved storage, access roles, backup responsibility, and a restore-test date. Do not enter credentials.

4. Rights and access decision

Identify consent, contracts, privacy, or other restrictions. Name the institutional role that will resolve uncertainty.

5. Repository and release

For each output, record repository fit, metadata, identifier, timing, retention requirements, and any access controls.

6. Owner, budget, and review trigger

Assign deposit and maintenance responsibilities, costs, next review date, and a handoff if the owner leaves.

BEFORE YOU USE THE RESULT

- Someone other than the analyst can locate and interpret an output.
- Sharing decisions and restrictions have an accountable institutional owner.
- The actual funder form, repository rules, and journal requirements were checked separately.

[Open the interactive worksheet.](#) This is a planning aid; follow applicable institutional and publisher instructions.