

LabSYNC Certification Process Checklist

After a Lab Has Been Recruited for LabSYNC

- Schedule Initial 2-hour Walkthrough, with Katie or Amorette and at least one intern
- Create Folder under LabSYNC/Assessments/<LabName>
- Create a copy of the walkthrough document, the scoring sheet, and this checklist, and place them in this folder with appropriate file names.
- Fill out as much information as possible on page 1 of the walkthrough document
- Add the lab to the Master LabSYNC List as In-Progress

Prior to the Walkthrough

Prep the following items to take to the Walkthrough in the LabSYNC duffel:

1. 2 clipboards with printouts of the walkthrough documents
 2. LabSYNC Tablet Computer
 3. Several HOBO meters
 4. At least 2 Watts-Up Pros
 5. HOBO meter cable, micro-usb cable
- *Dress Business Casual, long pants, and closed toed shoes

At the walkthrough

- Take notes
- Set up HOBO Meters and Watts-up-pros, taking notes of each device's location

Very soon after the walkthrough

Go through walkthrough document notes

Make a list of action items to collect additional data. These may include:

- Adding fumehood stickers
- Picking up meters and set up any additional ones
- Providing the lab with stickers, freezer maintenance kit, etc.
- Finding answers to questions the lab had

Fill out the scoring sheet based on the walkthrough notes, marking points 'Not Applicable' 'Not Achieved' or 'Achieved before LabSYNC' and adding notes to the LabRATS Notes column of the spreadsheet.

Highlight in green which points are high priority and grey out points that are not applicable.

Guidelines for demarcating high priority points

Incomplete Prerequisites are green

All pledge points are green

Any points that are really easy actions to achieve

Points we discussed on the tour that the lab expressed interest in doing

Additional preference given to 'required' points (the ones that affect the lab's point base)

Send your first draft of the scoring sheet to Amorette/Katie for review

In the two weeks after the walkthrough

After picking up meters, pull the data off of them immediately, and put them into excel files in the Lab's Certification folder.

- Finalize Scoring Sheet, then send to Amorette/Katie for confirmation/editing
- Lock all columns of the scoring sheet except the lab comments column

- Save

Sit down with Amorette/Katie for 30 minute meeting on additional actions to take.

Create custom powerpoint deck from Master Deck.

Include only slides for points the Lab might consider achieving.

Make sure to check every slide for required custom edits.

Save final customized deck to the Lab's file folder

Customize the LabSYNC Initial Report Template

- Send Initial LabSYNC Report
- Cut and paste Report Text into email and attach as a pdf to the email
- Attach the locked scoring sheet excel file
- Attach

2 Weeks After Sending Initial Report

Follow up with the Lab Contact to see if they have any questions

Ask if the lab would like to schedule a presentation for their group

Schedule a mandatory 1-hour appointment to assist the Contact in going through the Scoring Sheet together.

Ask if the contact would like printed copies of the Lab User Pledge to distribute for signing.

4 Weeks After Sending Initial Report

Follow up with a request for the Lab's Responses on the Scoring Sheet.

If an appointment has not yet been made, offer again to make a 1-hour appointment to assist the Contact in going through the Scoring Sheet together.

If the lab has not responded 6 Weeks after Initial Report:

Send a short reminder email again. List prerequisites that still need to be completed, and inform the lab that at the very least, if they can confirm those, their current score can be published.

After Receiving Lab's Edited Scoring Sheet or if Lab Cannot Complete Additional Points

Adjust any points the lab claims are not applicable.

Follow up on any final questions to finalize their Scoring Sheet.

Add Lab ECO-Leader Contact to LabRATS Contact list

Post Lab to LabSYNC Certified List on LabRATS Website, and add to Master Certification List in main LabSYNC Folder

Print Lab's Certificate, customized to their Score

Deliver Certificate and a handful of magnets to the Lab, and thank them for their time.

Send Final Scoring Email with list of ongoing Benefits the lab can claim a