CWRU Medical Student Checklist

UH Research Credentialing

Getting Started

☐ **1.** Find a UH Sponsor* to help you through the process. They must be a UH employee with knowledge of the roles and responsibilities you will perform while engaged in UH research.

☐ **2.** Complete the following documents by either completing electronically or printing out.

    ☐ a. **UH Sponsor Certification Form**

    ☐ b. **UH Electronic Systems Agreement**

☐ **3.** A background verification is required with the School of Medicine

    ☐ a. Visit https://case.edu/medicine/students/registrar/forms

    ☐ b. Click the, "Student Letter Request Form"

    ☐ c. Login with your CWRU ID and password

    ☐ d. Complete the form ensuring to request, "Background Check Verification Statement"

    ☐ e. In the additional information box, include the background check verification is a requirement of UH research credentialing.

    ☐ f. Select, "Email" as the Delivery Method and have the letter emailed to "UHResearchCredentialing@UHhospitals.org"

    ☐ g. Click, "Submit." *The School of Medicine will release the background verification to the UH Research Credentialing team.*

☐ **4.** You will need the following items to complete the Research Credentialing process

    ☐ a. A copy of your permanent resident card or a current copy of your visa and employment authorization card if you are not a UH Citizen.

       b. A current copy of your ID issued by your medical school

* The UH Sponsor must be a UH employee with knowledge of your roles and responsibilities and (i) ensure that any access provided to UH IT systems is properly granted and monitored; (ii) ensure that you have completed the necessary health screening prior to your start date if you will be present at a UH facility, and (iii) notify the research credentialing office if you discontinue participation in the program prior to your expected graduation date.

CITI (CREC) Training

Required modules must be completed with a cumulative score of 85% or better to pass the course. Once an investigator has successfully completed the training, CITI will notify Case directly.

- [ ] **1.** Start at the CITI Home Page here: https://about.citiprogram.org/

- [ ] **2.** Click "Register" under "Create an Account"

- [ ] **3.** Step 1 – Select Your Organization Affiliation

    - [ ] a. Type "Case Western Reserve University CREC Program" into the search text box. Select it from the drop down menu that appears.

    - [ ] b. Click the boxes next to the requested attestations.

    - [ ] c. Click the, "Create a CITI Program account" button.

- [ ] **4.** Step 2 – Personal Information

    - [ ] a. Enter First and Last name

    - [ ] b. Enter your e-mail address

    - [ ] c. Click "Continue to Step 3."

- [ ] **5.** Step 3 – Create a Username and Password

    - [ ] a. Record on the bottom of this section for future reference

    - [ ] b. Click "Continue to Step 4."

- [ ] **6.** Step 4 – Gender, Ethnicity, and Race

    - [ ] a. Complete all required (*) fields

    - [ ] b. Click "Continue to Step 5."

- [ ] **7.** Step 5 – Optional CE Credits

    - [ ] a. CITI offers Continuing Education (CE) credits/units for physicians, psychologists, nurses, social workers, and other professions allowed using AMA PRA Category 1 credits for professional re-certification. Please note the CE credits are available through purchase only and is NOT required for certification in the CREC Program.

    - [ ] b. Complete all required (*) fields

    - [ ] c. Click "Continue to Step 6."

- [ ] **8.** Step 6 – Information Required by CWRU

- [ ]   a. Complete all required (*) fields

- [ ]   b. Provide Case Network ID if you have one

- [ ]   c. Provide institutional information, not home address and office phone number

- [ ]   d. Click "Continue to Step 7."

- [ ] **9.** Step 7 – Select Curriculum

  - [ ]   a. Answer Question 1. Choose only one course: **Group 1** focuses on Biomedical research, **Group 2** focuses on Social & Behavioral research, and **IRB Reference Resource** is a compilation of both research perspectives. Most UH researchers take Group 1 or 2.

  -     b. Answering Question 2 and 3 is not required at this time.

  - [ ]   c. Click "Complete Registration."

- [ ] **10.** On the Main Menu, review the information listed

- [ ] **11.** Under "Course", the courses previously selected in Step 7 should show "Status" as "Not Started"

- [ ] **12.** Click the course name hyperlink to begin the program.

- [ ] **13.** For additional information on how to become CITI Certified please visit: http://case.edu/research/faculty-staff/education/crec/ or contact crec@case.edu.

Username: _____   Password: _____

UH Research Credentialing Application

- [ ] **1.** Click on the below link to begin the online application: https://redcap.uhhospitals.org/redcap/surveys/?s=8EHM9P3HKX

  *Please Note: The fee is waived for medical students participating. Therefore, please do not submit payment.

- [ ] **2.** Click "CWRU Medical Student Application" for the application type. Fill out the application to the best of your ability. *If you have any questions, please reach out to* UHResearchCredentialing@UHhospitals.org.

- [ ] **3.** Upload the saved files on your computer to the designated sections of the application.

☐ **4.** Click "Submit" or "Save & Return Later" if you need to complete later.

☐ **5.** Monitor the email address included in the application for email correspondence from the UH Research Credentialing team.

☐ **6.** Once approved, you will receive an email entitled, "<Your Last Name> UH IT Access" **Read this email carefully for next steps.**

☐ **7.** Once your email address is provided (ex. – john.smith@UHhospitals.org), send an email to crec@case.edu letting them know you completed CITI certification using your personal email address and have just been provided a UH email address. They will update your records so your profile shows up correctly in SpartaIRB.

Obtaining UH GPS/Outlook Access

☐ **1.** Ask your Sponsor to create a "Non-Employee Account" in SailPoint

   a. If they need assistance, more guidance can be found here:
   https://uhcommunity.uhhospitals.org/InformationTechnologyTraining/SailPoint%20Identity/Requesting%20UH%20System%20Access%20for%20Non-Employees%20with%20SailPoint%20Identity.pdf#search=gps%20non%2Demployee

☐ **2.** Provide your sponsor with your first and last name, your personal email address, your cell phone number, the last four digits of your social security number, your gender identity, your date of birth, and your expected graduation date.

☐ **3.** After submitting the request, your Sponsor will receive an automated email notification with your network credentials. You will not receive this email. Your Sponsor must forward this email to you.

☐ **4.** Log in to Outlook: https://mail.uhhospitals.org/ using the credentials provided in the email from your sponsor.

☐ **5.** You will receive an email notification to your new UH email address from UH GPS with instructions to complete the mandatory UH safety and compliance training. **You have 14 days to complete this required training.** Otherwise, your access will be revoked.

☐ **6.** If you get stuck, call UH IT at 216-844-3327.

Health Screening

- ☐ **N/A – I will not have in-person patient contact nor will I not work in patient care areas**

- ☐ **1.** If you plan to work in patient care areas, you must have evidence of immunity (blood test) to <u>OR</u> proof of vaccination for…

  - ☐ a. MMR (Measles, Mumps, Rubella)
  - ☐ b. Varicella
  - ☐ c. Tdap (Tetanus, Diphtheria, Pertussis) *– Within the last 10 years*
  - ☐ d. Hepatitis B
  - ☐ e. Current year's Influenza
  - ☐ f. Tuberculosis (TB) Two Step Skin Test or blood test *– Within the last 6 months*

- ☐ **2.** If you do not have evidence of immunity or proof of vaccination for the above diseases, you must file a signed declination with Employee Health in order to work
  OR #3 ↓

- ☐ **3.** If you need to get any of the vaccines listed above, you can do so at your primary care doctor's office or local pharmacy and ask for documentation.

- ☐ **4.** Once all blood tests/vaccinations have been acquired, email the documents to EHrecords@UHhospitals.org.

  - ☐ a. Please include "Research Credentialing" in the subject line.

Obtaining Your UH Badge

- ☐ **1.** All volunteers, contractors, and students are required to have a UH ID badge.
  *Keep your badge safe or you will have to pay a $10 replacement fee!

- ☐ **2.** Ask your Sponsor to complete Attachment A of UH Policy HR-29. They can access it in PolicyStat.

- ☐ **3.** Obtain the UH Department Chair's or designee's signature on Attachment A. If your Sponsor isn't sure who needs to sign, refer to this live worksheet: https://uhcommunity.uhhospitals.org/Credentialing/Cleveland%20Medical%20Staff%20Bylaws/Cleveland%20Medical%20Staff%20Leadership.pdf#search=department%20chair

☐   **4.** When complete, have your Sponsor email the memo to CMCandUHPSbadgerequests@UHhospitals.org and note that you are a Medical Student participating in research.

     a. If you will be working at a UH facility other than Cleveland Medical Center (e.g., UH Ahuja, UH Parma, etc.), reference this list for who to contact about your badge: https://uhcommunity.uhhospitals.org/HumanResources/HR%20Contacts/Badge%20Requests.pdf#search=non%2Demployee%20badge

☐   **5.** For security purposes, if you will be working in areas that are restricted, your Sponsor will need to coordinate with UHCMC's Police Department (Protective Services) or HR for the encoding of your badge.

☐   **6.** Make sure to give your badge to your Sponsor on your last day.

SpartaIRB Access

☐   **1.** Complete the SpartaIRB New User Request Google form to request a SpartaIRB account.

☐   **2.** After your account is created, let your Sponsor know to add your name to SpartaIRB study team members tables for studies in which you plan to participate. Ensure they include, "Non UH Employee Accessing UH PHI, Patients, and Property" under your role so the IRB Administration Office knows to check your UH Research Credentialing.

IMPORTANT: Once approved, you will have access to the necessary UH PHI, UH patients, UH property, and UH data until your expected graduation date. If you extend your program past your expected graduation date, you will need to reach out to UHResearchCredentialing@UHhospitals.org to extend your access.