

New Researcher Checklist

Investigators, Study Staff, Residents, Fellows & Students

- CREC Program Certification**
 - ✓ **What:** The CREC Program provides documented training in the protection of human subjects in research. To be entered into the CREC Program, you must complete CITI BASIC Training.
 - ✓ **Who:** All study team members conducting research at University Hospitals listed on the IRB application.
 - ✓ **How:** Visit [CREC.case.edu](https://crec.case.edu). Instructions can be found in the “Initial Core Training for CREC Certification” section.
 - ✓ **Course:** CITI BASIC Training fulfills your Human Subjects Protection (HSP) training requirement
 - User must select Group 1 – Biomedical or Group 2 – Social & Behavioral
 - *Non-UH employees also need to complete the CITI HIPS course.*
 - *If you are involved with NIH-funded research, you must complete the CITI GCP Course.*
 - If you completed CITI Training within the last 2 years, [affiliate your account](#) to transfer credits.
- UH Research Credentialing**
 - ✓ **What:** Research credentialing grants non-UH personnel a UH title and e-mail address. *Skip if you're a UH Employee.*
 - ✓ **Who:** All non-employees of UH who plan to access UH PHI, patients, property, equipment, and systems
 - ✓ **How:** Read [SOP GA 103: Research Credentialing](#) and review the [UH Research Credentialing webpage](#) for instructions
 - *After credentialing is approved, manager must submit a Sailpoint request for user access to the EMR, the UH GPS to complete required training, and other systems.*
- UH Investigator Training**
 - ✓ **What:** [UH Investigator Training](#) is a series of videos across five modules that serves as an introduction and detailed overview of the research process at University Hospitals.
 - ✓ **Who:** Required for all Principal Investigators and recommended for all others.
 - ✓ **How:** Available via [UH GPS](#).
- Clinical Research Orientation**
 - ✓ **How:** Required Training - Send an e-mail to ClinicalResearch@UHhospitals.org to register for one option below:
 - **OPTION 1** - Principal Investigators (PIs) and Physicians (approx. 30 min.)
 - **OPTION 2** - Staff & credentialed non-employees involved in research (approx. five hours)
 - *Medical Students, Residents, & Fellows are exempt from the options above unless specified by Research Integration & Education or your Department Administrator.*
- Velos Training**
 - ✓ **What:** Velos is the clinical research management software system in which all clinical research projects are **required** to be entered and managed. Training is designed to instruct study teams on the use of the Velos application.
 - ✓ **Requesting Access:** Complete the appropriate training in UH GPS. Once completed, a notification will be sent to Velos Support and you will receive instructions for initial login within 24 hours.
 - [Velos for Principal Investigators](#) - 15-minute training via GPS.
 - [Velos for Study Coordinators](#) - 1 hour training via UH GPS
- SpartalRB Account Setup**
 - ✓ **What:** SpartaIRB is the electronic IRB submissions system shared by UH and CWRU
 - ✓ **How:** Visit the [SpartalRB Info page](#) and click on **SpartalRB New User Request**.

Resources

- Sign up for the **UH Research Listserv** to receive research-related administrative and educational communications.
 - ✓ **How:** Send an e-mail to ClinicalResearch@UHhospitals.org.
- Use the [UH Research Roadmap](#) to navigate the UH research process.
 - **Accessing PHI for research requires IRB approval.**
 - **Accessing PHI for preparatory to research requires Privacy Office approval per UH Research [SOP GA-102: Use and Disclosure of Protected Health Information Preparatory to Research](#).**
 - **All Chart Reviews require IRB approval before collecting data.**
 - **All Case Reports with three(3) or less patients do not require IRB approval.**
 - **Four(4) or more patients will be considered a systematic chart review and requires IRB approval.**
 - **All Quality Improvement (QI) projects and Case Reports with ≤ 3 patients must be submitted to the IRB for Non-Human Research (NHR) determination**
- Check out our [Research Education Catalog](#) to sign up for classes via UH GPS or live.
 - ✓ Reach out to schedule a group session that works with your team's schedule.
 - ✓ We can also customize education based on your needs and interests.
- Go to **IRB Walk-In Hours** for one-on-one help or to ask about the SpartaIRB system. See schedule: [IRB Webpage](#).
- Contact [Carrie O'Neill](#), Manager, Research Integration & Education, for help developing a customized learning plan, or add a meeting to her outlook calendar to discuss.