Discovery Student Onboarding

Purpose: **This document outlines the onboarding process and requirements for Emory's Discovery Students who are completing research projects at Children's Healthcare of Atlanta.**

Discovery Program
- A required course for all Emory Medical Students to complete a five-month period of research. The overall assignment is a completed manuscript.
  o The five months do not have to be concurrent
- Scope of Projects: student can participate in any kind of research project. The most common project selected is a retrospective chart review. Some choose to participate in survey studies. Due to time constraints, participation in clinical trials is discouraged.
- Timeline:
  o Earliest start: March of M3 year
  o Latest start: September of M3 year
  o Deadline for completion: the following February
- Project Preparation
  o Required Items for project approval
    ▪ Approved Research Proposal
    ▪ CITI Certification
    ▪ Completion of additional courses as identified by mentor
    ▪ Copy of IRB timeline submission
      • Project should be submitted two months prior to starting
      • Overall submission of the IRB is considered a responsibility of the Mentor. Student participation can be expected but should not be their responsibility.
    ▪ Approved IRB – submitted 10 days prior to starting
- Content Experts
  o Dr. Maureen Powers – Discovery Director
  o Lisa Brooks-McDonald – Discovery Administrator

GME Onboarding Process
– The clinical onboarding process required for students to have patient interactions and access to EPIC.
  o Note: Most of the Discovery Student have completed their year of pediatrics

– The process of GME Onboarding is changing, resulting in different process for students depending on their years in the program.

  o Current State (M3 & M4 students)
    ▪ Students in their M3 & M4 years are credentialed and receive network login information just prior to the start of their first clinical rotation at Children's.

Discovery Student Onboarding

- If an M3 or M4 discovery student does not yet have access, please reach out to GME@choa.org with the following information to obtain network access:
    - Legal Name (First and Last)
    - Gender
    - SSN
    - DOB
    - Email
    - Cell phone number
    - Access start date
    - Student program graduation date
    - CHOA campus
    - Institution
- Children's GME office will work with provider data management team to get student credentialed and generate network access. Once this is complete, the student will receive network login, access to the Children's system and onboarding packet with training requirements
- Timeline: Approximately three weeks

- Current State (M1 & M2 students)
    - Students will be onboarded to system when they are initially enrolled to medical school, and they will remain active until they graduate.
    - Children's GME office will receive list of incoming students from Mary Kaye Garcia and will work with provider data management team to get student credentialed and generate network access. Once this is complete, the student will receive network login, access to the Children's system and onboarding packet with training requirements

- Future state (M1-M4 students)
    - By August 2025, all students will be credentialed and have network access starting in the M1 year.

- Additional Notes:
    - There are separate EPIC templates for clinical rotations and research. Discovery students who have clinical templates but not research templates should reach out to ResearchEducation@choa.org. Students should only be using the clinical templates when on a clinical rotation.
    - Profiles can go inactive without regular use.
        - To reactivate call Children's IS&T (404-785-6767) and complete a password reset.
        - Note: Profiles should only be used when students are actively in pediatric rotations or completing Discovery work.

- All clinical rotations (even if student has access) should be submitted to GME via Redcap:
  - Submission of clinical rotation information into REDCap by the clerkship coordinator (https://redcap.link/CHOAMedPAOnboard)
    - Database collecting demographics and wellness information.
    - Emory Master agreement allowing Children's to bypass additional wellness requirements
  - Once this is complete, the student will receive training requirements for clinical rotations
- Key Contact: Tianna Chapman, Graduate Medical Education Programs Coordinator (gme@choa.org).

– Content Experts
  - Katie Smith – GME Program Manager
  - Tianna Chapman – GME Program Coordinator

Research Onboarding
- Research Education is required because they are conducting research within the Children's system
- How to Engage Research Education
  - Step 1: Discovery Team/Mentor to reach out to ResearchEducation@choa.org once student's proposal has been approved to begin the research onboarding process.
  - Step 2: Students will be instructed to complete the Research Education REDCap form and asked to provide project specific information. Training tracks will be assigned based on this information.
    - All training assigned is required prior to starting research activities.
    - Students are encouraged to start trainings as soon as their project has been identified to prevent delays in research activities.
- Track 1: Retrospective Chart Reviews
  - **Research Process Training**: Computer Based Training (CBT), required for all researchers in the Children's system. A self-paced training module that will typically take an hour to complete.
  - **Epic Training:** 3 CBTs assigned through Workday. Task will typically take an afternoon to complete. Access is typically issued within 24 hours.
    all research activities should be done within the Epic Research Template for auditing purposes
- Track 2: Prospectively Enrolling Studies
  - **Research Process Training**: CBT, required for all researchers in the Children's system. A self-paced training module that will typically take an hour to complete.
  - **Epic Training**: 3 CBTs assigned through Workday followed by a (approximately) 2-hour Instructor Led Course. Instructor Led portion is offered twice per month, Thursdays 9 am -11 am at the Children's Support Center (1575 Northeast Expwy NE).
    all research activities should be done within the Epic Research Template for auditing purposes

- This class reviews consenting procedures, consent documentation, linking visits, and other required action items for research staff within Epic. Access is typically issued within 24 hours of completion of the instructor-led course.
    - o **Clinical Research Administration Orientation**: 2-hour instructor led course via WebEx offered the 2nd Tuesday of each month 10 am – 12 pm.
        - Class currently capped at 30 and can permit overflow as needed
    - o **CTMS Training**: CTMS is Children's Clinical Trial Management System and works in conjunction with Epic. 30-minute instructor-led course via WebEx offered the last Wednesday of each month at 3 pm.
- Content Expert
    - o Jennifer Shipp – Research Education Manager

Contracting
- Contract initiation is largely triggered by the approval of a study's IRB (details below with estimated timelines).
- In order to ensure success and align with the Discovery student timeline, if a study has been submitted to the IRB, but is not yet approved please email researchadministration@choa.org with the study protocol and IRB number. This advanced notification will allow the team to initiate contracts sooner. Please include that the project is a Discovery project so the team understands the time urgency.
    - o It should be the responsibility of the Menor to ensure the student is added to the IRB and all applicable contracts are in place. They can do this by emailing the above email and requesting information.

- Current estimated turn-around-times for contracts
- Emory IRB
    - o Retrospective Chart Reviews need a data use agreement (DUA). Contract is a standard template and take a week to execute.
- Prospective Enrollment (Consenting) need true contract. The Unfunded Research Agreement will take around 2-4 weeks to execute. We are hoping to reduce this timeline by finalizing a template with Emory but that is still in progress.
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- Children's IRB
    - o The Research Administration team is automatically notified of an approved IRB with external study staff (which would be all Discovery Students). A DUE is automatically in place for these studies.
- Content Expert
    - o Amanda Simpson – Manager of Research Administration & Tech Transfer

Appendix:
- How do I know which IRB to choose? – where does this live electronically? Can we share? Link to IRB Decision Tree.pdf
- Link to Children's IAA Acknowledgement Form

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