

UH Research Credentialing Checklist

1. Before Applying

- Confirm eligibility for research credentialing and review the application and renewal procedures – **GA-103: UH Research Credentialing** and **R-46: Clinical Research Credentialing**.
- Confirm research plans – Applicants should connect with their UH PI and Sponsor to collect the IRB numbers and discuss their role and responsibilities.
- Obtain required HRP/CITI Certification - information on initial training, transferring CITI certificates, and renewal can be found on the [HRP website](#).
 - If your CITI training is NOT associated with CWRU, UH, or MetroHealth, you will upload your CITI Certificate into the research credentialing application and must register with the CWRU HRP program *after* receiving your UH ID and e-mail.

2. Application Submission

The online UH Research Credentialing Application can be found [here](#).

Complete applications are reviewed within 7 business days – Research engagement should not begin until official approval is received from the UH Research Credentialing Office.

Note: The application is interactive, and the requirements and instructions vary based on your answers (e.g. application type, age, institution affiliation)

- Fill in all required fields - incomplete applications will not be reviewed.
- Sign and submit documents via DocuSign - the UH Research Credentialing Office will receive them automatically.
- UH PI and Sponsor Approval - after application submission, the UH PI and Sponsor listed will automatically receive a REDCap form to confirm the research information detailed in the application and agree to serve in their roles.

3. Approval Notification

Applicants, their UH Sponsor, and the department administrator will be notified that research credentials have been granted via e-mail.

- The approval email contains important information, including:
 - The applicant's credentialing expiration date and research information
 - Steps for obtaining UH IT access and badge
 - Instructions for submitting health records
 - This checklist

4. Obtaining UH IT System Access (Outlook, GPS)

- Sponsors, or the department administrator, will submit a SailPoint request for the research credentialed individual. Resources/instructions can be found [here](#).
- After submitting the request, Sponsors will receive an automated email notification with the Applicant's network credentials. Applicants do not receive this email; Sponsors must forward the e-mail to the Applicant.
- Applicants can log in to Outlook using the credentials provided by their UH Sponsor. These credentials are also used to access GPS, REDCap, and other UH IT systems.

5. Confirm HRP Certification

- Verify or obtain your HRP Certification. Resources such as the Initial and Recertification User Guides and instructions for transferring your CITI training from your home institution are on the [HRP website](#).
 - All UH research personnel must have an active HRP Certifications *before* they can be added to IRB-approved studies
 - Questions regarding HRP Certification and SpartaLearn should be directed to spartalearn@case.edu.

6. Health Screening

- If Researcher Credentialed personnel will be on-site in patient care areas or have in-person patient contact, they must provide vaccination/immunity records to UH Employee Health.
- Applicants should follow the instructions detailed in the "UH Health Screening Requirements" form attached in their approval e-mail.
- Questions regarding health reporting requirements should be directed to EHrecords@UHhospitals.org.

7. Obtaining a UH Badge

- All non-UH employees are required to have a UH ID badge.
- Sponsors must complete Attachment A of [UH Policy HR-29](#) on behalf of the Applicant. Sponsors may refer to [this](#) live form to determine signature needs.
- If the Applicant will work at Cleveland Medical Center, Sponsors should e-mail the complete form to CMCandUHPSbadgerequests@UHhospitals.org and note the Research Credentialed study team member is a Non-employee participating in research.
 - If the Applicant will work 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.
- For security purposes, if Research Credentialed personnel will be working in areas that are restricted, Sponsors will need to coordinate with UHCMC's Police Department (Protective Services) or HR to encode the badge accordingly.
- Research Credentialed personnel should return their badge to their UH Sponsor once their research engagement has ended.

8. SpartaIRB Access

- Research Credentialed personnel should complete the [SpartaIRB New User Request Google Form](#) to request a SpartaIRB account. Creation and activation can take up to approximately 1 week.
- Once their account is active, Applicants should notify their UH Sponsor to be added to appropriate studies.
 - Sponsors should include, "Non-UH Employee Accessing UH PHI, Patients, and Property" under the Applicant's role so the IRB Administration Office knows to confirm your UH Research Credentialing status.

9. Complete UH-Required Research Education

- Attend Clinical Research Orientation. The Research Integration and Education team will send you an invitation. In-person and virtual options are available.
- Complete UH research education training in GPS. You will be assigned training, and it will appear on your GPS transcript. Training is required for initial applicants only.