Instructions for Registering and Completing Human Subject Protection Training

This document includes instructions for:

A. Registering for a Collaborative Institutional Training Initiative (CITI) account
B. Affiliating with another institution
C. Selecting and completing a training course
D. Finding an active/refresher course
E. Adding a course
F. Finding course completion documentation
G. Updating your profile and contact information
H. Updating your Continuing Education (CE) interest

Already completed training via CITI for another institution? Follow the instructions beginning on page 4 for Affiliating with Another Institution.

Need to complete refresher training? Once a user has completed training, CITI programming automatically registers users for refresher training approximately 60-90 days prior to training expiration. Follow the instructions for Finding an Active/Refresher Course.

If you have any questions about registering for CITI or completing this training, please contact Kelly Unsworth at (585) 275-5244 or by email at kelly_unsworth@urmc.rochester.edu.

A. Registering for a CITI Account

1. Go to the Collaborative Institutional Training Initiative (CITI) webpage at www.citiprogram.org and click on ‘Register’.

   ![Register Button](image)

2. Registration Step 1: Enter the University of Rochester in the textbox to identify your affiliated institution and select the checkbox to agree to the Terms of Service. (Do not select ‘Log in Through My Institution’; the single sign-on option is not available for UR faculty/staff/students.)
   - After agreeing to the Terms of Service, select the checkbox to affirm that you affiliated with the University of Rochester.
   - After affirming your affiliation, click ‘Continue to Create Your CITI Program Username/Password’.

   ![Log In Button](image)
3. Complete the remaining registration steps as prompted, clicking ‘Continue’ to proceed through each step. Note:
   - All new users will be directed to complete a ‘Member Profile’ (generic to CITI) and an ‘Institutional Profile’ (specific to the University of Rochester).
     - Within the ‘Member Profile’, users will be requested to identify a ‘preferred email’. **UR faculty/staff/students are strongly encouraged to enter their UR email address as the ‘preferred email’** as all notification concerning training renewal/expiration are sent to the ‘preferred email’; personal email accounts may be entered as the ‘secondary email’.
     - Within the ‘Institutional Profile’, **all UR faculty/staff/students must enter an accurate UR email address in the ‘institutional email’ field** to facilitate access to the UR’s Research Subject Review Board’s online review system. All non-UR individuals completing CITI training on behalf of a UR collaboration may enter their personal email in the ‘institutional email’ field.
   - If you receive a prompt that indicates your email address is already in the system, please contact CITI directly at 888-529-5929 to retrieve your username and password. If your existing account was created through another institution, follow the instructions provided below to affiliate your existing account with the University of Rochester.
   - Users are provided the option of receiving Continuing Education Units (CEUs) for course completion. Should you wish to receive CEUs, you must answer ‘Yes’ when prompted and provide the requested information regarding credits. **Users are responsible for the fees associated with these CEUs** (the University of Rochester does not cover this fee); as such appropriate billing information will need to be provided when prompted. Additional information about obtaining CEUs can be found by clicking on the ‘CE Credits’ link on the horizontal toolbar at the top of the screen or by contacting CITI directly at 888-529-5929.

4. Registration Step 7: See the information provided below on selecting and completing a human subject protection course.

B. Affiliating with Another Institution

**NOTE:** The instructions provided below are intended only for study team members who have previously completed course through CITI for another institution.

1. Log into your existing CITI account at [www.citiprogram.org](http://www.citiprogram.org) (creating a new account will not allow you to receive credit for previously completed work). If you need assistance logging in, please contact CITI directly at 888-529-5929 (CITI can help update email addresses and passwords, as necessary).
2. From the landing page, under the ‘Institutional Courses’ heading, click ‘Add Affiliation’.

3. Enter the University of Rochester in the textbox to identify your affiliated institution and select the checkbox to agree to the Terms of Service.
   - After agreeing to the Terms of Service, select the checkbox to affirm that you affiliated with the University of Rochester.
   - After affirming your affiliation, click ‘Continue’.

4. Complete the contact and demographic information. For all UR faculty/staff/students, enter your UR email address in the ‘Institutional Email’ field; this is critical for facilitating access to the UR’s Research Subject Review Board’s online review system.

5. Follow the instructions provided below on selecting and completing a human subject protection course. Note: Once you are affiliated with the UR and a training course has been selected, CITI’s software will sum the requirements of both the UR and your previous institution to evaluate whether any previously completed modules may be eligible for transfer credit. Transfer credits are based on the type of training required by each institution and each institution’s training expiration procedures.
C. Selecting and Completing a Training Course

1. Select the checkbox for ‘Human Subject Protection’ and click ‘Next’.
   - Only courses within the ‘Human Subject Protection’ curriculum (i.e., the Biomedical Researcher or Social-Behavioral-Educational Researchers courses) meet the University’s human subject training requirements (see OHSP Policy 201 Education Program). The Responsible Conduct of Research, Animal Care and Use, and/or Good Clinical Practice courses do not meet this training requirement; courses within these curriculums should only be select when required by a funding agency, sponsor, and/or department.

   ![Question 1](image)

2. On the following page, select one of the ‘Human Subject Protection’ courses provided based on the type of research being conducted (i.e., ‘Biomedical Researcher’ or ‘Social-Behavioral-Educational Researcher’) and click ‘Next’. Note:
   - Generally, faculty/staff/students working on research conducted in the medical center (or one of the medical center’s affiliates) should complete the ‘Biomedical Researcher’ training.
   - Only members of the Research Subjects Review Board and OHSP/RSRB staff should complete the ‘IRB Member’ training.
   - If this is your first time completing human subject protection training, complete one of the courses listed under the ‘Initial Certification Program’ heading.
   - If you have previously completed training in CITI for another institution and are unsure which course to select, contact Kelly Unsworth.
   - If you selected more than one curriculum on the previous page (e.g., ‘Human Subject Protection’ and ‘Good Clinical Practice’), you may be directed to select additional coursework within the additional curriculum.
   - If you are prompted to verify your course placement, select the ‘Stage 1’ option if this is your first time completing human subject protection training or ‘Stage 2’ if you are completing refresher training.
3. To begin the course, click ‘Start Now’.
   - Note: If you have previously completed coursework for another institution and transfer credits are provided, the course may be listed under the ‘Active Courses’ heading. Once you begin the course, you will only be directed to complete modules that were not required at your previous institution. In the event, credit for all UR-required modules transfers, the course will appear as complete (no further coursework is required).

4. You will be prompted to complete an ‘Assurance Statement’ prior to initiating the training. Once this has been completed, click ‘Start’ adjacent to the first training module to begin the course.

5. Complete all required training modules and each respective quiz as prompted. Note:
   - You may start the course, leave it and come back to it at any time. To access the course at a later time, log into CITI and locate the course using the instructions provided below.
   - You may re-review modules and re-take quizzes, if you wish, by selecting ‘Return to Gradebook’ at the bottom of the computer screen. From the module listing, select ‘Review’ adjacent to the module you wish to re-review.
   - Additional supplemental modules are available for researchers to complete. These modules are optional and researchers may choose to complete some or all of these modules. OHSP recommends that researchers complete modules that correspond with the nature of the research being conducted.
6. Once you have completed the final module, you will receive a notification at the bottom of the screen indicating that you have completed the course.

7. Following course completion:
   - It is recommended that you print a Course Completion Report for your records prior to logging out of CITI (see instructions below). Please provide this documentation to your department administrators, study coordinator or project manager per your study/departmental needs.
   - The UR will pull course completion data from CITI automatically; you do not need to provide documentation of your training to OHSP. For UR faculty/staff/students completing initial training, approximately 1-2 business days following course completion, you will receive an email confirming creation of your user account in Click IRB. Once you have received that notice, you may proceed to submit your research for review/approval and/or be added to existing studies.

D. Finding an Active/Refresher Course

1. From the landing page, under the ‘Institutional Courses’ heading, click ‘View Courses’ adjacent to the University of Rochester listing.

2. Active courses that have not yet been completed will be listed under the ‘Active Courses’ heading. Courses that have not yet been initiated will be listed under the ‘Courses Ready to Begin’ heading. Click ‘Start Now’ or ‘Continuing Course’, as appropriate, to enter the course.
   - Note: CITI programming automatically registers users for refresher training approximately 60-90 days prior to training expiration. If the training you wish to renew is not listed (or you wish to renew the training in advance), follow the instructions below to add the refresher course.
E. Adding a Course

1. Follow the instructions above in Part D to locate your University of Rochester course listing.

2. Scroll to the bottom of the page to find ‘Learner Tools for University of Rochester’. Select ‘Add a Course’.

3. Follow the instructions listed above for selecting and completing a course.

F. Finding Course Completion Documentation

1. Follow the instructions above in Part D to locate your University of Rochester course listing.

2. If the course was recently completed, select ‘View-Print-Share’ under the ‘Completed Courses' heading. For older course work, select ‘View Previously Completed Coursework’ in the “Learner Tools for the University of Rochester” box and then ‘View-Print-Share’ for the course of interest.

3. Select ‘Copy Link’ to share the Completion Report or Completion Certification via hyperlink or ‘View/Print’ to print or save the Completion Report or Completion Certificate. (Note: Most sponsors, funding agencies and study monitors will request the Completion Report as this provides more detail than the Completion Certificate.)
G. Updating Your Profile and Contact Information

1. From the landing page, click on your name in the upper right-hand corner and select ‘Profiles’ from the resulting drop-down menu.

2. Scroll down to select ‘Edit Profile’ adjacent to the University of Rochester listing (under the ‘Institutional Profiles’ heading). Note: While users may update their ‘Member Profile’, the information provided in this profile does not integrate with Click IRB; only the information provided in the ‘Institutional Profile’ for the University of Rochester integrates with Click IRB.
3. Update the profile accordingly, completing all required fields (as indicated by the asterisks) and click ‘Update’ to save your changes.

**H. Updating Your CE Interests**

1. From the landing page, click ‘CEUs’ on the horizontal toolbar at the top of the page.

2. Update your CE Credit Status by selecting the radial button for either Yes (to receive CE credit) or No (to de-activate CE credits) and click ‘Submit’.