UNDERGRADUATE ONBOARDING PROTOCOLS
FOR PARTICIPATION IN RESEARCH ACROSS DISCIPLINES

Not all onboarding steps presented in this document may be pertinent to your work (*e.g.*, you may not require student eRecord access or human subjects trainings); however, they are listed in the order in which they will need to be completed, as needed. Contact undergradresearch@ur.rochester.edu or Sharon McCullough in the URMC Graduate Education and Postdoctoral Affairs Office with questions about compliance.

1

Students independently complete requisite safety and ethics trainings.

Students have free online access to
- CITI trainings (Human Subjects Protection, Good Clinical Practice, Responsible Conduct of Research, IACUC),
- Environmental Health & Safety Laboratory Safety Training (completed through MyPath; instructions available on linked site)
- HIPAA training (through MyPath or this video and training confirmation)

Students should complete the trainings *relevant to their experience* and save and share their certificates with their supervisor and/or a department administrator upon completion.

Complete "hiring" procedures appropriate for the type of position:

2

- **Paid position**
  A department administrator or PI will need to follow Student Employment's protocol for posting and hiring a research assistant. Email the Student Employment Office (seo@rochester.edu) with any questions or concerns. Per University policy, a student cannot receive pay and academic credit simultaneously.

  Note: If the student has a Research and Innovation Grant (RIG), payment will be arranged through the Office of Undergraduate Research. The student will need to complete a request for disbursement of funds and meet with Ann Robinson (ann.robinson@rochester.edu) to use the grant.

- **Student is working for course credit**
  The student will fill in an Independent Study form through River Campus Advising Services. See these Faculty Instructions or visit the Office of Undergraduate Research's Faculty FAQ for more detail on what information the student researcher will need from the mentor.

- **Student is working as an unpaid intern and is not seeking course credit**
  URMC: A department administrator can fill in the SMD Unpaid Internships and Shadowing Form together with the student researcher (click here for additional information about the form).
  River Campus: The student, faculty mentor, or a department administrator should complete an online notification form.

  Note: During the summer months, unpaid, not-for-course-credit students can apply for the Discover Grant for Summer Undergraduate Research to support basic living expenses.

3

Collect supplementary paperwork from the student researcher, as needed, to keep on file for compliance.

Students will need to provide a department administrator with copies of any necessary training certificates from Steps 1 and 2.

If the student will be interacting directly with human subjects at URMC, they will need an annual health assessment, flu shot, and PPD test. SMD offers instructions on how departments can arrange these annual screenings here.

4

Request a URMC Active Directory (AD) account for the student researcher.

For URMC affiliates only, as needed. A department administrator or staff/faculty member with access to ADTools will need to submit a request using the procedures described in this document. Be prepared to answer the following questions in a follow-up email:

1. Describe the position type the student will be serving in at URMC and affiliates (*intern*)
   Note: A copy of the approved SMD Unpaid Internships and Shadowing Form will need to be sent to an accounts manager if the student is working with URMC as an unpaid intern and *not* for course credit.
2. Do you have a process for this user to complete URMC HIPAA training? (*student can/should have completed this independently, as per Step 1)*
3. What applications/network resources will this user need access to?
4. Will this user be using a URMC issued computer or a personal computer? Encryption services can be provided for personal devices as needed.

Contact the ISD Help Desk (275-3200) or Tom Hossler with questions.

5

Add student to appropriate project protocols and assign department-specific training as needed.

- Request student access to any necessary project-specific trainings (vivarium, etc.) not completed by the student in Step 1. A list of MyPath trainings accessible to students can be found here.
  - URMC requires that students working with patients or their data complete annual Mandatory In-Service Training.
- An RSRB approval letter will be needed if requesting eRecord access.
- Undergraduate students must request REDCap access before they can be added to any ongoing REDCap projects.
- Department administrators can assist with obtaining any necessary "swipe access" for a student's U of R ID.

6

Complete an eRecord application packet if the undergraduate researcher requires eRecord/EPIC access.

- A manager/department supervisor can request student access to eRecord or ePartner (view-only privileges) by calling or emailing the ISD Helpdesk: 275-3200 or Helpdesk_ISD@URMC.Rochester.edu. Be prepared to detail and justify the extent of access the student user will need.
  Note: View-only access will be the quickest to process and requires the most straightforward training for the student (all online). If the student requires additional editing privileges, more training may be needed off-site. ISD estimates that even basic access set-up can take around 3 weeks.

Contact the ISD Help Desk (275-3200) with questions.