

# Paid Off-Site Keenan Research Summer Student Forms For PI/Managers

# Keenan Research Summer Students 2021 (Paid Offsite)

Dear Supervisor/Investigator,

These instructions are to register a **Keenan Research Summer Research Student (Paid – Offsite)**.

The Keenan Research Summer Student (KRSS) Program provides opportunities for undergraduate and medical students to conduct research at Unity Health Toronto under the supervision of a principal investigator (scientist and/or MD).

Remote/Off-Site Requirements:

1. 100% of their work CAN be completed from offsite
  2. Appropriate remote supervision (via Zoom, phone, etc.)
  3. Earliest Start Date: May 3 2021
- Research summer students MAY be granted access to Electronic Medical Records (e.g., Soarian/Sunrise) or have access to PHI of patients or research subjects providing they pass a research specific privacy training course.
  - Research Students doing any recruiting or consenting, even remotely, will need to be added to the REB approved protocol
  - Remote onboarding and network access to UHT email/folders/intranet will be arranged
  - Research Students and their supervisors are required to complete the standard onboarding packages.

If you plan on switching your paid offsite student to paid onsite, you should be completing the onsite instructions instead. The student can only work onsite beginning June 7. They will work offsite prior to this date.

## PROCESS:

The below steps 1-3 (student creating an online profile, PI completing all paperwork) must be completed and submitted **at least 3 weeks prior** to the student's start date. Any delays in paperwork (sending it late, incorrectly completing forms, will result in a delayed start date if not received in time).

1. All students must complete an online profile prior to registering through the SRS system. See the "Getting Started".
2. Once PI forms are completed, send these to the KRSS Coordinator ([KRSS.Program@unityhealth.to](mailto:KRSS.Program@unityhealth.to)) along with the student's CV/Resume and proof of registration as an undergraduate student or medical student. *(Please note that one reference check form will be required and is included in the PI Forms)*
3. Investigator (or designate) to ask the candidate to upload their resume to the UHT resume bank. Please have your candidate submit their resume to the UHT Resume Bank: <https://unityhealth.to/get-involved/work-at-unity-health/employment-opportunities/>. On the left hand side, click on "Add resume to Talent Pool". Fill in all the required information, upload resume and submit application.

4. The KRSS Coordinator will verify that all information is complete and will forward to HR for processing.
5. HR will then draft and send the Investigator an Offer Letter for review and approval. Please keep an eye out from HR for the draft offer letter.
6. RENEWAL - If you wish to extend your Research Student, please contact [KRSS.Program@unityhealth.to](mailto:KRSS.Program@unityhealth.to) well in advance of expiry to ensure that access is not lost.

### Keenan Research Summer Student Assignment Form for PIs/Managers

Please complete all fields. It is the Investigator's responsibility to ensure adequate training and supervision are available to support the Keenan Research Summer Student's work. Please note that students are NOT allowed on-site this summer due to the pandemic.

<b>Keenan Research Summer Student Name:</b>	
<b>PI Name:</b>	<b>Phone Ext:</b>
<b>Program Manager: (If applicable)</b>	<b>Phone Ext:</b>
<b>Start Date:</b>	<b>End Date:</b>

Please describe why you are engaging this Keenan Research Summer Student and what they will receive from the experience:	
Please describe the specific duties of the Keenan Research Summer Student:	
Please describe all relevant skills or qualifications:	
Please confirm that the student will not be working with biological material	<input type="checkbox"/> I confirm
Is there any additional training beyond the standard training required? - SRS Privacy training	
Which days and what hours will the Keenan Research Summer Student be expected to work?	

Please describe how the Keenan Research Summer Student will be supervised virtually. Please include a mentor plan if applicable.	
Please confirm that the Keenan Research Summer Student will not be exposed to or interact with research subjects / patients and/or their samples?	<input type="checkbox"/> I confirm
Research Students doing any recruiting or consenting, even remotely, will need to be added to the REB approved protocol. If your student will be carrying out such tasks, have you informed or contacted the Research Ethics Board? <a href="http://www.stmichaelshospital.com/research/reb.php">http://www.stmichaelshospital.com/research/reb.php</a>  Please be reminded that Research Students working on REB approved studies should complete TCPS2 Training and if applicable GCP training (found here: <a href="http://stmichaelshospitalresearch.ca/staff-services/research-education-training/">http://stmichaelshospitalresearch.ca/staff-services/research-education-training/</a> )	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the Keenan Research Summer Student a student?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, what school and program are they enrolled in?	
Will the Keenan Research Summer Student be gaining academic credit?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Will the Keenan Research Summer Student be switching from working off-site to working on-site in the future?	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Keenan Research Summer Student Service Agreement

**Please read carefully before signing.**

**Please check each box to acknowledge your understanding and agreement.**

The supervisor/PI agrees to:

- Adhere to all responsibilities outlined in section 1.8 of the Research Volunteer and Visitor Policy (see Instructions – for Section 1.8)
- Provide virtual supervision, training, orientation, supervision and feedback to the Student specific to their work area/field
- Be accessible (via phone/email) to the student for input, direction and to share information.
- Ensure that the Student does not come on site

The Keenan Research Summer Student agrees to:

- Maintain a professional commitment to the Keenan Research Summer Student position
- Seek direction from supervisor if Keenan Research Summer Student is unsure
- Read and understand the workplace violence policy
- Not to exchange contact information – including address, phone numbers, email or social networking information – with patients, study subjects and/or their friends and family.
- Complete the training and have understood it fully
- Maintain confidentiality
- Review the Research Volunteer and Visitor Policy and other relevant SMH policies within 30 days of start date

All registered Keenan Research Summer Student at SMH have accepted the Keenan Research Summer Student role description outlined in the Keenan Research Summer Student Assignment Form for PIs/Managers and have agreed not to make any significant changes in their engagement without first informing the ORA.

I understand and accept the terms of the foregoing Keenan Research Summer Student

PI/Manager (print) name:	Keenan Research Summer Student (print) name:
PI/Manager Signature:	Keenan Research Summer Student Signature:

## **UHT Keenan Research Summer Student Program During COVID-19 Pandemic Acknowledgement**

Due to the evolving COVID-19 situation, changes have been implemented to the Keenan Research Summer Student Program.

- Keenan Research Summer Student must not have any direct, physical, interactions with research subjects or team members.
- Keenan Research Summer Student must be able to perform their work from their homes.
- Keenan Research Summer Student may have access to the Electronic Medical Records (EMR) if required for the position and if the Research Privacy Training has been completed via the SRS and appropriate virtual training on the EMR and oversight is provided by the PI and/or study team
- Keenan Research Summer Student must have appropriate training and oversight provided virtually by the study team (via zoom, phone, etc.)
- The ORA will arrange for remote onboarding and access (Keenan Research Summer Student will not need to come on-site for badge access)
- Keenan Research Summer Student will have limited access to library services at UHT.
- Keenan Research Summer Student and their supervisors are required to complete the standard onboarding package.

By signing below, you acknowledge and agree to the conditions listed above.

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PI/Manager Signature

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Keenan Research Summer Student Signature

## Accessing Patient Data for Research – Acknowledgment

Please carefully review and acknowledge your understanding of the following:

- The hospital is committed to respecting, protecting our patients', staff privacy, confidential corporate information and personal health information while balancing the need to foster an environment for academic learning and shared knowledge.
- Research personnel (including but not limited to research visitors, volunteers, KRSS students, post-doctoral fellows, graduate students and medical students here for research purposes) **will not be permitted** under any circumstances independent access to patients nor will they be able to participate in direct patient care.

### Observing Patients on Site

- As a result of the pandemic, Research personnel are currently **NOT** allowed to observe or shadow in any hospital clinical environment.

### Access to Patient Data through Electronic Systems (e.g., Soarian) & Patient Charts

- Research personnel may get VIEW only access to electronic medical records or charts providing it is required and justified for the research project they are working on and the following conditions are met:
  1. The research personnel has completed the Research Privacy training available in the Student Registration System (SRS)
  2. The research personnel is working on an approved Research Ethics Board (REB) research study, which requires access to electronic medical records or charts stored by the hospital
  3. The research personnel has been added to the research team of the approved REB research study.
  4. The supervising researcher/PI ensures that the research personnel is trained appropriately on patient privacy and the electronic system before accessing electronic medical records or patient charts.
- Depending on circumstances further conditions may be imposed.
- Research personnel should never access electronic medical records using someone else's account.
- Once all of the above requirements have been met, the supervising researcher/PI can submit a request to allow research personnel under their supervision to gain access to electronic medical records
  - SMH: a ShopIT request (electronic medical record: Soarian/Sovera).
  - St. Josephs: email sent request to [Cordelia.Cooper@unityhealth.to](mailto:Cordelia.Cooper@unityhealth.to) (electronic medical record: Sunrise/Sovera)

### Requirements for Research Personnel and their Supervising Researcher/PI

- You (research personnel and supervising researcher/PI) are responsible for all of the following:
  - Ensure adequate training and certification to conduct the activities in accordance with the approved research protocol



- Understand and follow appropriate hospital policies and procedures
  - Report any breaches of privacy to the Privacy Office: [privacy@unityhealth.to](mailto:privacy@unityhealth.to) and Research Ethics Board: [researchethics@smh.ca](mailto:researchethics@smh.ca)
  - Provide clearly defined activities consistent with the research protocol so that the research personnel only access patient information for the purpose described in the approved study protocol.
  - Ensure oversight/supervision of research personnel with access to medical records is consistent with the approved research protocol
  - Ensure the REB is informed of all study changes, including personnel changes or additions, for research projects
  - Ensure all patient health information transcribed/abstracted remains on the hospital's secure network and that appropriate controls are in place if data is being transferred to an offsite sponsor/collaborator etc. (e.g., contract, described in research ethics application etc.).
  - Understand that research personnel accounts that access patient records may be audited at any time (as per usual practice).
- And that You (research personnel and supervising researcher/PI) **DO NOT** do any of the following:
    - Share, lend, or allow others to use your access log in to medical records or patient systems
    - Share, remove, or discuss patient health information outside of the approved research protocol
    - Violate any privacy or confidentiality guidelines and/or legislation, including the Personal Health Information Protection Act (PHIPA) of Ontario
    - Do not access or use any shared system (e.g. ConnectingOntario, PRO, OLIS, eCHN, RM&R, HDIRS, IAR) for research purposes
    - Violate any research ethics guidelines
    - Engage in any activities beyond those specified in the approved research protocol or beyond the researcher personnel's role at any time
    - Engage in any research activities prior to receiving REB and other required institutional approvals
    - Engage in any research activities prior to completing all required research training
    - Allow patient health information or data transcribed/abstracted for research purposes to leave the hospital or to be stored anywhere other than on the hospital's secure network
    - Save personal health information or confidential information on a personal device (must be saved on a network drive)
    - Email personal health information to a non-Unity Health email address.
    - NOT print any personal health information at home

**Questions for PI/Manager:**

1. Will the research personnel have access to personal health information?
  - a.
  - b. If yes, what personal health information will the research personnel have access to?

- c. If yes, where will the personal health information be stored? (e.g., network / shared folder, electronic medical record)?
  
2. Will the research personnel have access to electronic medical records (Soarian/Sovera at SMH/Sunrise/Sovera at St. Joseph's)?
  - a.
  - b. If yes, how will you (PI) ensure that research personnel only access records that they should?
  
3. What training and oversight will you (PI) provide the research personnel in the care and handling of personal health information to ensure there are no privacy breaches?
  
  
  
  
  
  
  
  
  
  
4. How will you ensure that PHI does not leave the site?

*(It's important that the manager/ PI overseeing the student(s) review the exact data flow and ensure that the data is being abstracted and stored and does not leave the network. When accessing patient records remotely through Citrix/VPN, research personnel must ensure that all data is stored saved and stored on the network and not the hard drive of a personal device or emailed to personal emails.)*

5. Will research personnel email PHI to any non-Unity Health Email addresses?
  - a.
  - b. If yes, please describe the conditions which will ensure that the data will be kept safe.

**I acknowledge, understand and accept the terms regarding access to hospital patients and their data which is limited to a specific research purpose. I understand that I may be audited by the Hospital at any time.**

Date:

Date:

PI/Manager (print) name:

Research Personnel (print) name:

PI/Manager Signature:

Research Personnel Signature:

## Employment Reference Form Non-Clinical Positions

<b>Competition #</b>		<b>Competition Position Title &amp; Department Name</b>					
<b>Reference Completed By</b>		<b>Date completed</b>					
<b>Candidate's Name</b>		<b>Candidate's dates of Employment &amp; Position Status</b>					
<b>Name of Reference</b>		<b>Position title of Reference</b>					
<b>Company</b>		<b>Contact Information</b>					
<b>Relationship to Candidate</b> Are you this candidate's direct supervisor? Y/N		<b>1. How long have you known the candidate? 2. How long did the candidate report directly to you?</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">1.</td> <td style="width: 95%;"></td> </tr> <tr> <td style="text-align: center;">2.</td> <td></td> </tr> </table>	1.		2.	
1.							
2.							

<b>1. Can you confirm the candidate's job title?</b>	
<b>2. Can you speak to the scope of this candidate's previous /current position? What were their primary duties and responsibilities?</b>	
<b>3. What are the candidate's strongest qualities?</b>	
<b>4. What are some areas that need improvement/development?</b>	
<b>5. How is or was the candidate's attendance and punctuality? Is he/she reliable?</b>	
<b>6. Is he or she a team player? How would you describe their interactions with their co-workers, patients, or customers?</b>	
<b>7. Has the applicant ever been placed in a stressful or demanding situation? How did they handle it? What was the end result?</b>	
<b>8. Please speak to the quality and accuracy of the candidates work.</b>	
<b>9. How do they perform with a tight timeline? Do they complete projects/assignments on time?</b>	
<b>10. Is this candidate able to self-manage and work independently? What degree of oversight was required on your part?</b>	
<b>11. Can you speak to the candidate's written and verbal communication skills?</b>	
<b>12. If you were going to advise us on how best to support and develop</b>	

## Employment Reference Form Non-Clinical Positions

<i><b>this candidate, what would you recommend?</b></i>	
<i><b>13. What is/was the candidate's reason for leaving the organization? (Confirm Voluntary/Involuntary)</b></i>	
<i><b>14. Given the opportunity, would you rehire this candidate? Yes/No</b></i>	
<i><b>15. If not, please explain</b></i>	
<i><b>16. Do you have any additional comments?</b></i>	
<i><b>Notes:</b></i>	

Hire Known Candidate for Offsite Summer Students 2021 + Conflict of Interest Disclosure Form

Manager Information	
PI Name	Phone Ext:
Program Manager (If applicable)	Phone Ext:
Candidate Information	
Name of Candidate:	
Assignment/Payroll Information	
Position:	Research Student Research - Students
Start Date: (Important – All paperwork must be sent to <a href="mailto:KRSS.Program@unityhealth.to">KRSS.Program@unityhealth.to</a> 3 weeks in advance of the start date. Must be a Monday, unless a statutory holiday, in which case it must be Tuesday)	
End Date: (If applicable. Casual assignments must be temporary)	
Pay Scale: \$14.25 – 17.38	
Work Type: (formerly Job Status)	Casual – Co-op Students are casual employees but usually work FT
If Part-Time, identify how many days per week	
Reason for Hire:	New Position
Payroll Information: (Please refer to the attached spreadsheet <a href="#">Research Org Units</a> )	GHR Organization Unit Name: Research - Students Organization Unit Number: 87
Payroll Time Entry Person: Dalbir Singh	

Accounting Unit & Activity Number(s):				
	Company	Accounting Unit	Activity Number	Percentage (%)
1				
2				
3				
4				

**\*NOTE: All PI's who own any of the above mentioned cost centre(s) must be copied in the request for RFA approval.\***

Conflict of Interest Disclosure for Hiring this Candidate:	
Is the candidate a family member of the supervisor (or the individual responsible for the decision to engage this incumbent)?	
Is the candidate affiliated with an organization in which the supervisor or the supervisor's family member has a financial or ownership interest?	
<p>(Family Member includes a spouse, domestic partner, child, parent, sibling, grandparent, grandchild or other close relation. For the purpose of this policy (i.e., Research Conflicts of Interest), a family relationship includes biological relationships, adoptive relationships, relationships created through marriage and other relationships in which care-giving or dependency exists. Please note that if you check "Yes", before this hire can be processed this information will be forwarded to the Office of Research Administration for review under the Research Conflicts of Interest Policy)</p>	

Additional Questions	
Is this position COVID-19 related?	
Will the candidate be solely off-site?	
<p>If the candidate will be working offsite, please review the remote work guidelines and confirm that the candidate be keeping confidential data private.</p>	<p><a href="https://tw.unityhealth.to/2020/10/01/remote-work-policy-and-program-building-organizational-capacity-to-safely-and-effectively-work-from-home/">https://tw.unityhealth.to/2020/10/01/remote-work-policy-and-program-building-organizational-capacity-to-safely-and-effectively-work-from-home/</a></p> <p><a href="https://tw.unityhealth.to/2020/05/14/privacy-and-security-guide-for-working-offsite/">https://tw.unityhealth.to/2020/05/14/privacy-and-security-guide-for-working-offsite/</a></p> <p>I confirm that the above information has been reviewed.</p>

Criminal Check	
Have you advised the candidate that a Criminal Check will be required before their start date? Consent will be obtained through email from HR in advance of issuing the contract letter)	
<p>St. Michael’s Hospital conducts Criminal Record Checks for all external candidates. We ask that you advise the candidate that a Criminal Check will be required before their start date. Candidates may not begin working at SMH prior to submitting a Criminal Check which they will complete via email in advance of their first day at work.</p> <p>For purposes of the Criminal Record Check, we need the following information from the Candidate:</p>	
Candidate legal first name	
Candidate legal last name	