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# Appointment Processing of Clinical Trainees at the School of Medicine

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Office of Postdoctoral Affairs

March 7<sup>th</sup> 2012, 10:00am – 11:30am

Li Ka Shing Center 130

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# Agenda

- Introduction, Alistair Murray
  - Denise Wreden, Medical Staff Office
  - Alistair Murray, Office of Postdoctoral Affairs
  - Jessica Mendonça, Office of Academic Affairs
  - Ann Bjelland, Faculty Compensation
  - Jessica Meyer, SPECTRUM
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# What is a Clinical Trainee (Fellow)?

- A Clinical Fellow is a MD, MD/PhD **with full or incidental patient contact in advanced years of training** (year 4 or higher)
    - ACGME programs (even during research-intensive years)
    - And non-ACGME training programs
  - Clinical Fellow appointments are set up in PeopleSoft as MF (Medical Fellow) Academic Plan, e.g. PEDS-MF
  - Clinical Fellows are setup with OPA, GME and other Offices
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# Overview of Process Steps

Appoint at Stanford (OPA). See online checklist:

[http://postdocs.stanford.edu/admin/how-to/appt\\_scholars.html](http://postdocs.stanford.edu/admin/how-to/appt_scholars.html)

Setup Clinical Appointment with SHC (GME)

Direct Fellows to Complete Required Training:

HealthStream, HIPAA, Respectful Workplace, and  
Paperwork: Immunizations

Direct Fellows to Complete Other Training

Prepare Orientation Folder (see OPA toolkit online)

Sign-up trainees for Postdoc Benefits Orientation

Lookup the PeopleSoft ID Number

Enter Paylines/Stipend/Info in GFS

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# MEDICAL STAFF SERVICES

Medical Staff Credentialing  
Process

March 2012

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# *What is Credentialing?*

- Credentialing is the process a health care organization follows to determine if a provider has the appropriate licensure, training, education and competence to treat patients and be granted clinical privileges.
- Providers may NOT treat any patients independently at the hospital or in the clinics without going through this process.
- The credentialing process follows all requirements from Joint Commission, IMQ, NCQA, Title 22, CMS

# Process for New Applicants

- Credentialing Process documents the following:
  - Current licensure
  - Relevant training and experience
  - Current competence
  - Teaching appointment (if applicable)
  - Other verifications
    - CA DEA, Fluoroscopy License, National Practitioner Data Bank, OIG, GSA, Board Certification, Peer References, Work History, Continuing Medical Education, Health Status, Background Check
  - Other documents
    - HIPAA compliance
    - Conflict of Interest and Confidentiality statement

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# Review of File

- Verifications are gathered and files are reviewed by the Medical Staff Coordinators
- The following items are flagged for Service Chief/Department Head review:
  - Actions taken by or against license, DEA, board certification, other hospital affiliations, federal agencies
  - Item(s) listed on the background check
  - Open or settled malpractice claims
  - Negative peer recommendations or prior affiliation information
  - Gaps in service or education of three (3) months or more
  - Actions on the NPDB report
  - Answer of “Yes” on any of the attestation questions
  - Discrepancies between application and verification information



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# Occupational Health Updates

Mary Spangler, M.S., N.P., COHN-S

*Director, Occupational Health  
Services*

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# Immunization Requirements

- Proof of immunity to measles, mumps, rubella
    - 2 MMR vaccines or + lab titers
  - Proof of immunity to chickenpox
    - 2 Varivax vaccines or + lab titers
  - Evidence of diphtheria, tetanus, pertussis vaccine (Tdap)
    - or signed declination form
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# Immunization Hepatitis B

- All individuals who are exposed to blood or other potentially infectious body fluids must provide proof of Hepatitis B immunization (3 vaccines) or document + titers.
  - If the vaccine is declined a Hepatitis B Compliance/Declination Form must be signed.



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# Tuberculosis

- One or Two-step Tuberculosis Skin Test (TST), or Quantiferon (QFT) blood test is required within 90 days prior to start date.
  - For history of + TST or +QFT a chest x-ray within 90 days prior to start date is required.
  - Annual TB surveillance required
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# Influenza Vaccine

- Annual Flu Vaccine (or signed declination) is required in accordance with California state regulations during the flu season.



# Santa Clara County Mandate (New!)

- Mandates the masking during the flu season for all healthcare workers in hospitals or healthcare facilities in Santa Clara County who decline the influenza vaccination.



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# Stanford Hospital and Clinics / Lucille Packard Fellows

- Ground floor of the hospital.

650-723-5922

- Take the escalator down to the ground floor. Turn R then immediate L.

Check in at the end of the hall.

## Hours

- M & W 7:00 – 3:30
  - T&T 7:00 – 6:00
  - F 7:00 – 2:30
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# Stanford University Fellows

- Environmental Safety Facility (ESF)  
480 Oak Road, Room B15

Phone: (650) 725-5308

- **Hours:**  
Monday – Friday  
8:00 am - 5:00 pm
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# Postdoctoral Affairs

Alistair Murray

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# Appointing Clinical Trainees (Fellows)

## When to Appoint Clinical Trainees through OPA?

- For an “Academic Affiliation” with Stanford University.
- If funding will come from Stanford University sources (Training Grants...)
- To facilitate eligibility for the Trainees to apply for external fellowships through RMG (such as American Heart Association)

A Clinical Fellow appointment in OPA should be concurrent with a GME appointment.

A GME appointment of a Clinical Fellow does not require a concurrent appointment in OPA.

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# Who Is Involved in a Clinical Trainee Appointment

Stanford University staff who are designated with the Office of Postdoctoral Affairs at Postdoctoral Administrators

Staff who initiate the process must be:

1. Authorized users of PeopleSoft
2. Able to review and upload documents to PeopleSoft
3. A point of contact for the Fellows regarding requirements, process steps and arrival orientation

An academic org must exist for the division with the University

Approval roles must be established for the division

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# Responsibilities of Postdoc Admin Staff

## Complete Required Training and Get Access to PeopleSoft

1. PeopleSoft “Concepts & Compliance” Course (online)
2. Postdoc Policies and Procedures Course (OPA 1001. Next: March 15)
3. PeopleSoft Postdoc Web Forms Course (OPA 1011. Next: March 8)

Online courses at: <https://www.stanford.edu/dept/as/sandhr/learnps/index.html>

Register in STARS

## Collect information from the sponsoring faculty and trainee:

- ❑ Non-Stanford Email address of the clinical trainee to initiate the appointment (e.g., @gmail.com, @yahoo.com, CANNOT be SUH or LPCH sponsored @stanford email address.)
- ❑ Appointment start and end dates, funding amounts and sources and any other special terms and conditions of appointment.

## Be point of contact for the trainee on the process and training requirements

- ❑ Give Stanford student ID to trainee
- ❑ Monitor completion of all required training
- ❑ Submit immunization data to Occupational Health
- ❑ Follow checklist of required payroll and other setup documents:  
<http://postdocs.stanford.edu/admin/checklist.html>

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# Required Paperwork to Upload in PS for OPA's Review

1. Copy of the diploma or degree completion letter
  2. Any external funding letters
  3. Recent and complete curriculum vitae
  4. Copy of CA medical license. A printout of a valid license from [www.medbd.ca.gov](http://www.medbd.ca.gov) is acceptable.
  5. Signed Patient Care Form  
[http://postdocs.stanford.edu/admin/pdfforms/Patient\\_Care\\_Form\\_2012.pdf](http://postdocs.stanford.edu/admin/pdfforms/Patient_Care_Form_2012.pdf)
  6. Agreement for Services Outside of Fellowship– submit only if the trainee will bill for services. Billing must be outside of the fellowship program scope.  
[http://postdocs.stanford.edu/admin/pdf-forms/MD\\_AgreementBilling.pdf](http://postdocs.stanford.edu/admin/pdf-forms/MD_AgreementBilling.pdf)
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# Steps to Process an Appointment

1. PD Web Forms is the method for submission of appointment.
  2. All information entered in Postdoc Data Form online by Trainee
  3. Trainee uploads supporting documents (PDF) to the Data Form and submits it.
  4. Administrator receives Data Form, reviews it and approves if correct, or returns if incorrect/incomplete.
  5. Administrator initiates the Recommendation Form after approving DF.
  6. Administrator collects any missing and additional documents.
  7. Administrator submits completed work for approval to DFA/Other Designee. THIS STEP GENERATES THE OFFER LETTER.
  8. Upon acceptance of letter by trainee, Administrator approves so that transaction is routed to OPA for final review.
  9. OPA approves completed and correct submissions within 5 days. Approval email is sent to Administrator and the Trainee.
  10. Administrator prints email and other documents and submits complete packet to GME.
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# Deadlines, Procedures and Forms

Appointment Start Date	Submit Complete Appointment in Workflow to OPA	GME Deadline*
<b>July 1</b>	<b>No later than May 10</b>	<b>May 16</b>
<b>August 1</b>	<b>No later than June 10</b>	<b>June 20</b>

The above deadlines apply to completed and correct submissions.

OPA will return transactions in WF or notify you if the submission is not complete or incorrect for you to resubmit.

NOTE: Submit complete work or contact Alistair Murray if unsure.  
Returning transactions will require a re-acceptance of the offer letter online by the trainee.

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# Funding Policy for Clinical Trainees

- ALL Clinical Fellows must receive the PGY level support that's appropriate to them, whether they are appointed at OPA or at GME.
  - If the clinical fellow is in a research intensive year or period in a clinical training program, the fellow must receive the appropriate PGY level of support; i.e., no reduction in pay is allowable because the clinical trainee is doing research.
  - A combination of School and SHC/VA sources may be used towards the PGY support. All funding sources must be entered in GFS. Direct-paid SHC/VA funding must be entered as "info-only" lines.
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# Important Funding Guidelines

- Only funding that is paid towards support of the training program is counted as part of the PGY level. In other words, pay for moonlighting or other work at the clinics that is outside of the training program DOES NOT count towards the funding minimum required towards training.
  - Include all special funding terms and conditions (e.g., clinic time, on-call expectations...) in the offer letter.
  - Billing in the area of training is NOT ALLOWABLE.
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# Paying Clinical Trainees in GFS

Department/Division GFS Administrator aid-year activates and enters funding information in GFS and enters FLSHP TUITION or Approves TAL for tuition fees.

Funding information in GFS must include any Info Only Lines for support coming from GME/SHC.

Total funding level must meet appropriate PGY scale  
Total funding can be a combination of SoM and SHC sources

All trainees are charged A Registration fee of \$125 is charged per term

- Assist TAL Tab—use if paid salary. Calc TAL feature on Assist Salary tab will automatically generate tuition for you.
  - FLSHP Tuition Tab—use if paid stipend or by outside support
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# Exceptions to Clinical Appointments

- A written justification request from faculty sponsor, uploaded with the appointment documents online, is required in the following cases:
    - MD was conferred more than 6 years ago
    - An appointment is requested at less than 100%
    - Non standard curriculum
    - Foreign Nationals (require special review and additional approvals)
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# Non-U.S. (foreign) MD Clinical Trainees

- Can be clinical trainees with MD credentials from another country.
- Require CA Med Board License Section 2111 exemption approved by ECFMG and processed through GME. Must obtain GME Pre-Approval first.
- Their J-1 visas must be approved by ECFMG, processed through GME
- May not bill for services

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NOTE: A foreign MD in the US on a Research Scholar J1 visa CANNOT switch to a Clinical Trainee with a J1 Clinical Scholar Visa. Consult with Bechtel International Center.

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# MDs on Visas – J-1 Visa Status

- ECFMG will allow maximum of 7 years of clinical scholar program
  - MDs cannot be appointed to a research appointment (without ECFMG approval) prior to a clinical appointment as this is considered a change in program
  - Completion of studies and 2 year return home requirement:
    - J-1 Research Scholar status
    - J-1 Clinical Scholar status
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# Clinical Trainees at the VA or PAIRE

- **Stanford Policy Applies:**
    - Must be appointed by Stanford faculty member
    - Same Clinical Fellow appointment process
    - Use Stanford offer letter (modified for PAIRE per prior OPA approval)
    - Supporting documents must include VA proof of support
  
  - **Usually waive Postdoc Benefits – waiver form is still needed**
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# Concurrent Clinical Postdoc Trainee & Clinical Instructor Appointments

Jessica Mendonça, Office of Academic Affairs  
Ann Bjelland, Faculty Compensation

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# Policy

## School of Medicine Faculty Handbook

### Chapter 8.2.E.3.a

Concurrent Fellow / Clinical Instructor appointments are for exceptional circumstances

- ❑ a Postdoctoral Scholar who wishes to maintain currency of clinical skills
- ❑ a department wants a Clinical Fellow to moonlight to address clinical programmatic need

<http://med.stanford.edu/academicaffairs/handbook/chapt8-2.html#E3a82>

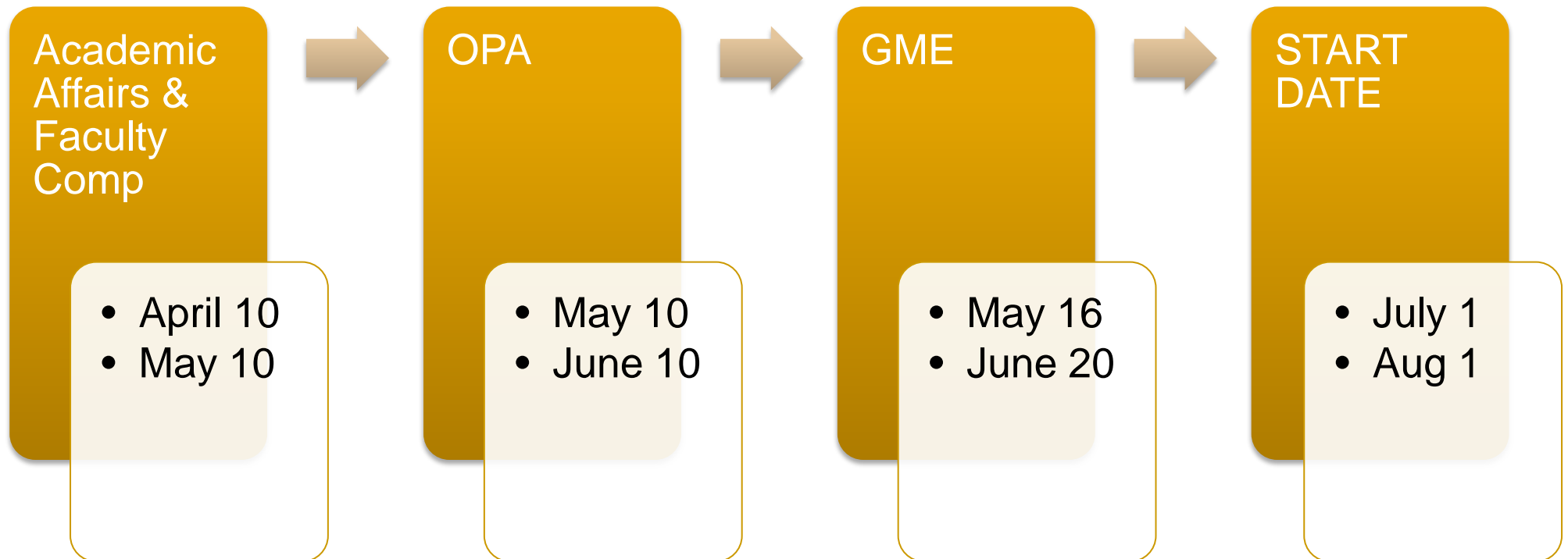
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# Sequence of Events

<b>POSTDOC APPOINTMENT PROCESS</b>	<b>CLINICAL INSTRUCTOR APPOINTMENT PROCESS</b>	
<b>Faculty Sponsor PI</b> invites applicant	<b>Department</b> identifies clinical need to be filled by the applicant	
<b>Applicant</b> completes <u>Postdoc Data Form</u>	<b>Department</b> assembles and submits Clinical Instructor appointment file to Academic Affairs	<b>Department/division</b> prepares and submits to Faculty Compensation financial documents (CV, source of salary support, business plan, and draft concurrent offer letter) for Clinical Instructor appointment
<b>Department</b> proceeds with <u>Postdoc appointment process</u> in PeopleSoft with OPA following normal deadlines and requirements	<b>Academic Affairs</b> reviews appointment file and draft concurrent offer letter	<b>Faculty Compensation</b> reviews financial documents, including draft concurrent offer letter
	<b>Academic Affairs</b> sends approval notification	
		<b>Faculty Compensation</b> sends financial approval notification and edited draft concurrent offer letter
	<b>Department</b> finalizes offer letter and extends Clinical Instructor position offer to applicant	<b>Applicant</b> accepts Clinical Instructor position offer, signs and returns offer letter to department/division
<b>Department</b> uploads signed concurrent offer letter to the Recommendation Form in PD Web Forms	<b>Department</b> provides copy of signed offer letter to Academic Affairs and to Faculty Compensation	
<b>Department</b> modifies system-generated offer letter prior to submission of Recommendation Form in PD Web Forms	<b>Academic Affairs</b> prepares appointment letter and sends it to department/division to be given to Clinical Instructor	<b>Department</b> HR initiates PeopleSoft Job web form; <b>Faculty Compensation</b> approves it

# Submission Deadlines



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# Required Documents

- Appointment file is same as for any new Clinical Instructor appointment

<http://med.stanford.edu/academicaffairs/CEs/documents/RequiredAppointmentDocuments.pdf>

Appointment forms and templates

Compensation documents -- concurrent offer letter

<http://med.stanford.edu/academicaffairs/CEs/>

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# Appointment Role & Responsibilities

## RECOMMENDATION

CLINICIAN EDUCATOR, INCLUDING (AFFILIATED) OR INSTRUCTOR, INCLUDING (AFFILIATED)

Action type: (Select one or more)

<input type="checkbox"/>	Add additional department or division	<input type="checkbox"/>	Extend current appointment
<input type="checkbox"/>	Appoint	<input type="checkbox"/>	Reappointment review in process
<input type="checkbox"/>	Line change	<input type="checkbox"/>	Promotion review in process
<input type="checkbox"/>	Change appointment dates	<input type="checkbox"/>	Terminal extension
<input type="checkbox"/>	Change percent time of appointment (FTE)	<input type="checkbox"/>	Promote
<input type="checkbox"/>	Change primary department or division	<input type="checkbox"/>	Reappoint
<input type="checkbox"/>	End a concurrent department or division affiliation	<input type="checkbox"/>	Reinstate lapsed appointment

Name (Last, First, MI)

Rank (Affiliated)

Department Division

Fixed term: start end Continuing term: Start

## Role and Responsibilities

Programmatic need for this academic appointment

Stanford clinical responsibilities and percent of total effort

If candidate will have concurrent appointments as a Clinical Instructor and a non-ACGME Resident or Fellow, check here to confirm that no billable activity will be allowed in his/her area of training and describe the duties required as part of the training program below or in an attachment. These activities must be clearly distinct from the billable clinical activity expected of the candidate as a Clinical Instructor.

Stanford teaching responsibilities and percent of total effort

Stanford administrative responsibilities, if any, and percent of total effort

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# Concurrent Offer Letter & Appendix

- Expectations and Responsibilities
  - Appointment
  - Assignment and Responsibilities
  - Funding and Compensation
  - Benefits
  - Leave
  - Requirements
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# Important Reminders

1. Must upload **joint offer letter** to the Recommendation Form in PD Web Forms.
2. Prior to submission of Recommendation Form in PD Web Forms, insert sentence into offer letter stating:

“Online acceptance of this offer letter is superseded by the joint Postdoc/Clinician Educator offer letter issued by Offices of Academic Affairs and Postdoctoral Affairs and signed by you”

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**Spectrum**

Stanford Center for Clinical and Translational  
Education and Research

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# **Overview of Spectrum & HealthStream Training for Postdoctoral Fellows involved in Clinical Research**

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Jessica P. Meyer, MBA

Linda S. Walker

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# SPECTRUM

Stanford Center for Clinical and Translational Education and Research

**MISSION:** To transform the research and educational enterprise at Stanford University in order to optimally support clinical and translational research (CTR)

What is translational research  
anyway?



<http://spectrum.stanford.edu/>

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# Spectrum Programs

- **Bioethics**
- **Biostatistics & Study Design**
- **Career Development & Diversity**
- **Child Health**
- **Clinical and Translational Research Unit (CTRU)**
- **Clinical Informatics**
- **Community Engagement**
- **Enabling Core Technologies**
- **Innovations and Pilots**
- **Operations, Training and Compliance (OTC)**
- **Research Education and Training**
- **Tracking and Evaluation**

[http://spectrum.stanford.edu/page\\_listings/spectrum-programs](http://spectrum.stanford.edu/page_listings/spectrum-programs)



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Clinical and Translational  
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Services and resources for setting up and conducting research, from study idea to publishing results.

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Short- and long-term education and mentoring programs. Find a mentor. Learn about training opportunities.

## Information for Patients & Community

Information about participating in a study, lectures, events and community outreach programs.

## Information for Research Sponsors

Learn about the process of how to sponsor research at Stanford University and find collaborators.

### ABOUT SPECTRUM

Spectrum is a Stanford independent research center funded by an NIH Clinical and Translational Science Award (CTSA). Its goal is to accelerate and enhance medical research, from basic discovery to improved patient care.

### HAVE QUESTIONS?

Where to contact us to learn more about clinical trials or conducting medical research at Stanford University.

Email: [clinicaltrials@med.stanford.edu](mailto:clinicaltrials@med.stanford.edu)  
Telephone: (650) 498-6498

### FEATURED STUDY



#### Does patient knowledge of their DNA lead to better outcomes?

Joshua Knowles, MD, PhD, is conducting a clinical trial to determine whether giving patients genetic information about their risk of coronary artery disease will help motivate them to reduce that risk by changing their behavior. To learn more, call Alex Pavlovic at 650-736-1147. [Read more](#)



Spectrum is funded in part with a Clinical and Translational Science Award from the National Institutes of Health.

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# Spectrum Operations, Training and Compliance (OTC)

- Facilitates clinical and translational research at Stanford and serves faculty and clinical research personnel at:
    - School of Medicine
    - Stanford University Medical Center
    - Lucile Packard Children's Hospital (LPCH)
    - Veterans Affairs Palo Alto Health Care System
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# OTC Mission

Enhance the quality of clinical and translational research performed at Stanford by:

- **Providing education**, required training and professional growth opportunities
  - Functioning as a **single point of contact** for Industry and Faculty with queries regarding clinical research at Stanford
  - **Working with University and Hospital** administrative offices on compliance and clinical trial processes
  - **Maintaining the regulatory integrity** of a growing community of sponsor-investigators at Stanford
  - Managing the **Health Screening, Safety and Compliance (HSSC) program** for School of Medicine clinical research staff involved in human subjects research
  - Administer the **HealthStream Training for Postdoctoral Scholars Program** for SoM clinical trainees involved in human subjects research
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# Overview of Services

- Protocol development through biostatistics and informatics consultation services.
- Study budgeting.
- Contracts with industry and grant sources.
- Automated billing, accounting, and internal financial auditing.
- Sponsor billing and study closeout.
- Internal compliance monitoring.
- Outpatient clinic space.
- Clinical laboratory consultation and samples processing.
- Study source document archiving.
- Research coordinator services: education, orientation and training; health screening; competency testing.
- Faculty investigator education and training.
- External audit and review support.
- Stanford Clinical Trials Website.
- Single point of contact for clinical research issues.



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# What is HealthStream™ Training?

- HealthStream™ Training is a joint effort of the Spectrum Office of Compliance, Training and Operations and the Postdoctoral Affairs Office, in collaboration with Lucile Packard Children's Hospital (LPCH), and Stanford Hospital and Clinics (SHC).
  - HealthStream Training is ***mandatory*** for all non-faculty School of Medicine (SoM) clinical research personnel, involved with clinical (human subject) research and data (clinical trials).
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- The goal of HealthStream Training is:
    - ❑ *to protect the health and safety of Stanford University clinical research personnel working with patients, clinical trial volunteers and /or patient health information (PHI) and*
    - ❑ to provide information and training for the safety of and to equip staff to perform patient-care duties within School of Medicine departments, in LPCH, SHC, VA Palo Alto Health Care System (VAPAHCS) and satellite facilities.
  
  - HealthStream Training is completed through the e-Learning Management Tool- the HealthStream Learning Center™ (HLC).
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# Screenshot of Spectrum Website: Postdocs

<http://spectrum.stanford.edu/accordions/postdoctoral-fellows>

**Spectrum** The Stanford Center for Clinical and Translational Education and Research

STUDY NAVIGATOR Log in

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RESOURCES FOR RESEARCHERS EDUCATION & MENTORING PATIENTS & COMMUNITY FOR RESEARCH SPONSORS

Home » Education & Mentoring » Postdoctoral Fellows

## POSTDOCTORAL FELLOWS

**EDUCATION AND TRAINING** MENTORING

- ▶ Advanced Residency Training at Stanford (ARTS)
- ▶ Biodesign Fellowship
- ▶ Clinical Research Training - Online
- ▶ Financial Support Opportunities
- ▶ Joint and Dual Degree Opportunities
- ▶ Masters in Epidemiology
- ▶ Masters in Health Services Research
- ▶ Overview of Training Opportunities for Postdoctoral Fellows & Residents
- ▶ Budgeting & Billing Training
- ▶ HealthStream Training for Postdocs (Research)

Spectrum supports postdoctoral scholars through advanced education programs to pursue a PhD or advanced education in Translational Research areas of their choice.

**SPECTRUM PROGRAMS**


- Biodesign Fellowship

**CONTACT INFORMATION**

Betty Cheng  
Spectrum Program Manager  
Research Education and Training  
(650) 723-6460



## CONTACT INFORMATION

Betty Cheng  
Spectrum Program Manager  
Research Education and Training  
(650) 723-6460 

### ▶ Budgeting & Billing Training

#### ▼ HealthStream Training for Postdocs (Research)

The HealthStream™ Training for Postdoctoral Scholars Program is a joint effort of Spectrum Operations, Training and Compliance and the Postdoctoral Affairs Office, in collaboration with Lucile Packard Children's Hospital (LPCH) and Stanford Hospital and Clinics (SHC).

HealthStream™ Training is mandatory for all non-faculty School of Medicine (SoM) research postdoctoral scholars, involved with human subject research and data (clinical trials).

HealthStream™ Training is completed through the e-Learning Management Tool – the HealthStream Learning Center™ (HLC).

#### Goals of HealthStream™ Training for Postdoctoral Scholars

1. Protect the health and safety of Stanford University clinical research personnel working with patients, clinical trial volunteers and /or patient health information (PHI) and
2. Provide information and training for the safety of and to equip staff to perform patient-care duties within School of Medicine departments, in LPCH, SHC, VA Palo Alto Health Care System (VAPAHCS) and satellite facilities.

#### Completing Your HealthStream™ Training

- If you are a current or new postdoctoral scholar in the School of Medicine, please complete the online Assessment Form to determine whether you are eligible for HealthStream™ Training. To complete this form you will need your SU employee/student ID number and the name and email address of your department human resources administrator. If you completed HealthStream from SHC/LPCH, please indicate on the online form. These records may transfer to reduce duplicity.
- New postdocs are required to complete this training within 30 days of assignment date and annually thereafter.
- If you have already received your log-in instructions, please visit SUSOM HealthStream™ to view your HealthStream™ profile and access your training modules.

#### ▶ Other Training Resources – Stanford

#### ▶ Professional Development Resources – Non-Stanford

#### KEY POINTS

- Postdocs involved in clinical research at Stanford University School of Medicine are required to complete the online Assessment Form.
- New assignments are due within 30 days of first notice and annually thereafter. Competency modules should be obtained through SHC/LPCH.
- Highly recommend postdocs attend the General Orientation to Conducting Clinical Research at Stanford to become familiar with CTR at Stanford University.

#### NEXT STEPS

- ▶ **Complete Online Assessment Form**  
Complete the online HSPDS Assessment Form to determine your requirement.
- ▶ **Access SUSOM HealthStream™ Learning Center**  
If you have received your User Name and Password, log-in to SU HealthStream Learning Center.
- ▶ **Questions?**  
OTC Education and Training Coordinator  
(Jessica P. Meyer)

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# Are the Postdoctoral Scholars in your department involved in Clinical Research?

- If the postdoctoral scholar has or will have in the next 12 mos.:
    1. In person, face-to-face contact with research participants?
    2. Access to PHI (protected health information) through enrollment, billing, phone screening, data analysis, etc)?  
Access to medical records (EPIC/Cerner)?
    3. An office or place where clinical research is conducted in a Stanford Hospital (SHC/LPCH/ and or clinics) Building?
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# PostDoc HealthStream Training Process

Step 1: All Postdocs complete Online Form

[https://stanfordmedicine.qualtrics.com/SE/?SID=SV\\_0Do8MAvpoDThLeI](https://stanfordmedicine.qualtrics.com/SE/?SID=SV_0Do8MAvpoDThLeI)

Step 2: Spectrum Reviews Form

- Determine eligibility.
  - If non-eligible, sends notification to postdoc and department administrator
  - If eligible, creates profile in the HealthStream™ Learning Center (HLC)
    - Sends course assignments to “Students”. Students will have 30 days to complete this training.

Step 3: Spectrum audits Completion Status

- At the end of every month, Spectrum audits postdoc profiles on HealthStream.
- If incomplete, Spectrum will send “Out of Compliance” notices to postdoc, Department Administrator and Alistair Murray

Step 4: Annual Compliance Audits

- Each fiscal year, Spectrum sends non-compliance reports to Rania Sanford and Alistair Murray.

# Department Manager Access to HealthStream

Department Managers can obtain access to the HealthStream Learning Center to review and monitor HealthStream compliance for postdoctoral scholars.

Contact Jessica Meyer to obtain access and instructions. You will need to provide the following:

1. Name
2. Department/Division
3. Email
4. Phone
5. Stanford Employee ID # (8-digits)



# PostDoc HealthStream Training Modules

\*Some of these courses have Pre-Assessment Tests\*

HealthStream Initial Assignments include the following courses:

1. Code of Conduct (includes Deficit Reduction Act)
2. Standard Precautions: Bloodborne Pathogens and Other Potentially Infectious Materials
3. Prevention of Healthcare-Associated Influenza- Infection Control
4. Quality Improvement
5. Patient Rights
6. Safety Reporting- Patient Safety Net
7. Electrical Safety
8. Emergency Preparedness
9. Fire Safety Awareness and Response
10. Confidentiality Statement
11. Service Excellence (SHC or LPCH)
12. National Patient Safety Goals
13. Respiratory Therapy
14. Cultural Diversity – Sexual Harassment
15. Prevention of Hospital Acquired Infections

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# Additional Clinical Research Training

Please see Clinical Research Personnel Training Checklist (PostDocs).

<http://spectrum.stanford.edu/accordions/postdoctoral-fellows/?ch2=7>

- Additional Training may be required:
    - ❑ CITI Training (Human Subject Research Protection) from the IRB
    - ❑ eProtocol Training from the IRB
    - ❑ See Training Assessment in STARS via AXESS (<http://axess.stanford.edu>)
    - ❑ Biohazardous Material Training from EH&S
    - ❑ Competency Training (i.e. Sedation),  
contact SHC: Vickey Weir, Ph: (650) 725-4611
  
  - Also recommended are the Spectrum Orientations
    - ❑ General Orientation- How to Conduct Clinical Research at Stanford
    - ❑ Budgeting and Billing- How to Budget a Study and how the Billing System works at Stanford
    - ❑ Please see the Education Calendar for dates and to register.  
[https://zm07.pobox.stanford.edu/home/cal\\_sc\\_som\\_cal\\_spectrum\\_education@stanford.edu/Calendar.html?view=month&color=blue](https://zm07.pobox.stanford.edu/home/cal_sc_som_cal_spectrum_education@stanford.edu/Calendar.html?view=month&color=blue)
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# Clinical and Translational Research Resources

- **Cancer Center** <http://cancer.stanford.edu>
  - **Research Compliance Office** <http://humansubjects.stanford.edu>
  - **Environmental Health & Safety**  
<http://med.stanford.edu/somsafety/training.html>
  - **Spectrum, The Stanford Center for Clinical and Translational Education and Research** <http://spectrum.stanford.edu>
    - **Spectrum | Child Health** <http://spectrumchildhealth.stanford.edu>
    - **Spectrum | Operations, Training and Compliance**
    - <http://spectrum.stanford.edu/researcher-resources/clinical/otc.html>
- Email:** [clinicaltrials@med.stanford.edu](mailto:clinicaltrials@med.stanford.edu)
- Services: CTR Planning; Biostatistics Consultation; Education and Training; Help Desk/Facilitator Services; Research Coordinator Services; Regulatory and Compliance Consultation; Study Navigator; CTR Management Tools and Services; Website
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# Questions??

## ■ Contact:

- Jessica P. Meyer, 650-498-6140,  
[jpmeyer@stanford.edu](mailto:jpmeyer@stanford.edu)
  - Linda Walker, 650-498-6498,  
[linda.walker@stanford.edu](mailto:linda.walker@stanford.edu)
  - [clinicaltrials@med.stanford.edu](mailto:clinicaltrials@med.stanford.edu)
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# General Resources and Tools

- OPA Information

General guidance:

[http://postdocs.stanford.edu/admin/clinical\\_trainees.html](http://postdocs.stanford.edu/admin/clinical_trainees.html)

- Orientation Toolkit for Administrators
  - HelpSU
  - Call 498-7618
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