CITI PROGRAM How to Establish a CITI Account and Register for IRB Training Courses

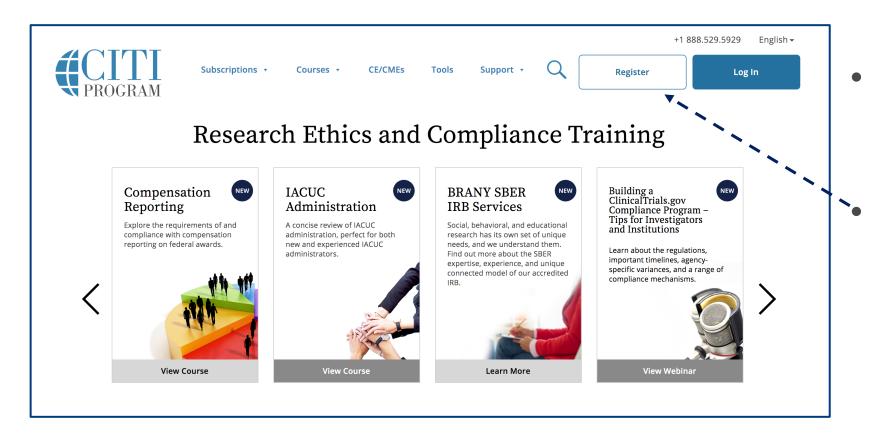
Marcie Ferguson, B.B.A.

Special Projects Manager & CITI Administrator

Office of Research and Sponsored Programs



CREATING AN ACCOUNT WITH CITI



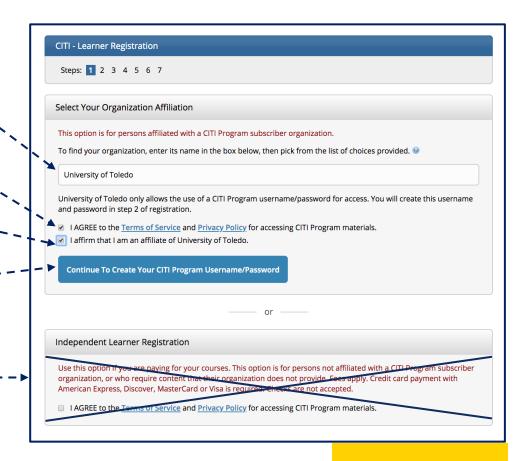
- Proceed to the CITI
 Program website at
 www.citiprogram.org
 - Left click on the "Register" button

- If you have a CITI account affiliated with the UToledo, skip to slide 9.
- If you have a CITI account affiliated with another institution, skip to the FAQ.



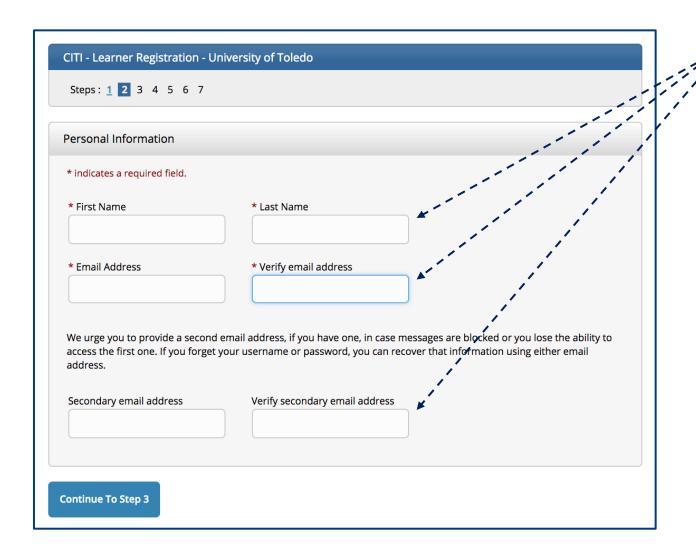
STEP 1: ORGANIZATION AFFILIATION

- Under Select Your Organization Affiliation type in University of Toledo and hit the return, key.
- Left click on the box to agree to the Terms of Service for accessing the CITI Program.
- Left click on the box to affirm that you are an affiliate of The University of Toledo.
- Left click on the Continue to Create Your CITI-Program Username/Password button.
- DO NOT SELECT "Independent Learner Registration" -- >
 - CITI will charge a non-refundable fee of \$110.
 - UToledo will not reimburse this fee back to you.
 - Office of Research and Sponsored Programs cannot reimburse this fee back to you.





STEP 2: PERSONAL INFORMATION



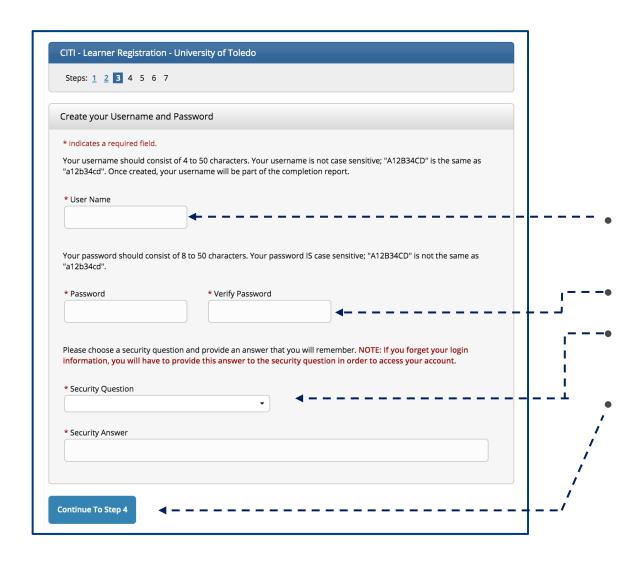
Enter the information requested in the fields on the screen.

 Double-check spelling before continuing to the next screen.

• Left click on the *Continue to Step 3* button.



STEP 3: CREATE USER NAME & PASSWORD



Create your user name (Using your UTAD keeps it simple)

Create and verify your password

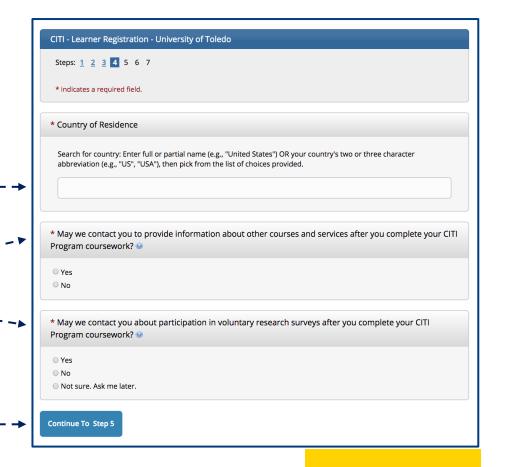
Select one of the security questions and enter the answer

Left click on the *Continue to Step 4* button



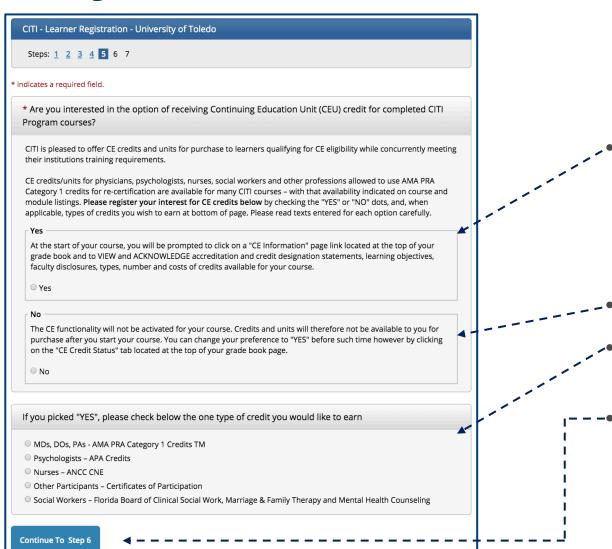
STEP 4: COUNTRY OF RESIDENCE

- Select your Country of Residence
 (This can be the full or partial name or ---- your country's two/three character
 abbreviation)
- Answer the two survey questions
- Left click on the Continue to Step 5 button ---





STEP 5: CEU'S Only for Medical or Mental Health Professionals



Select "YES" if you are eligible for CEUs and are going to utilize them. *If you select YES*, *you are responsible for all fees associated with obtaining CEUs. UToledo will not cover these expenses*.

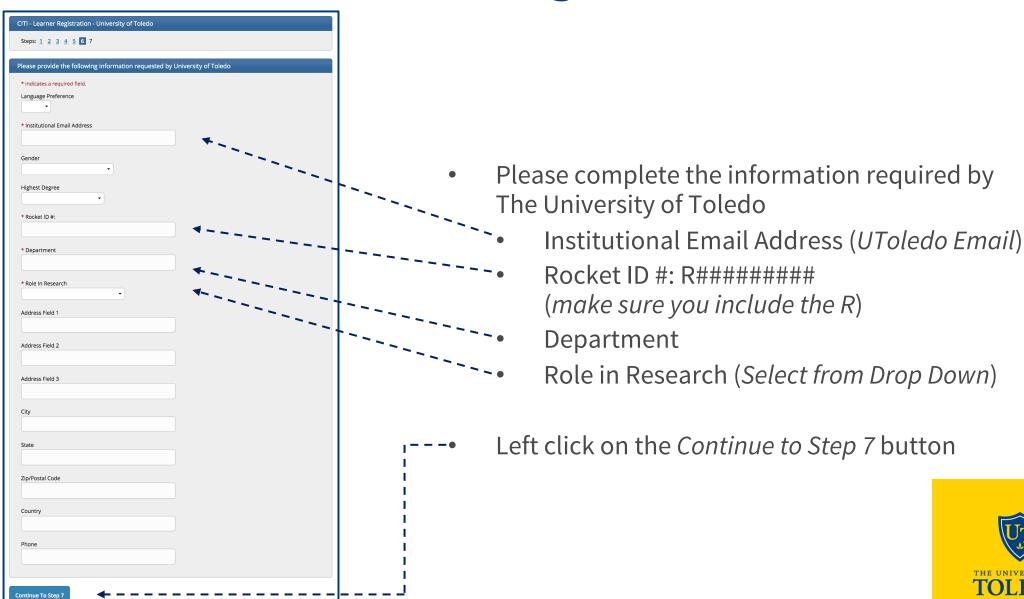
Select "NO" if you are not going to utilize CEUs

Select the type of credit you would like to earn if you answered "YES"

Left click on the Continue to Step 6 button



STEP 6: UTOLEDO REQUIRED INFORMATION



STEP 7: SELECT CURRICULUM

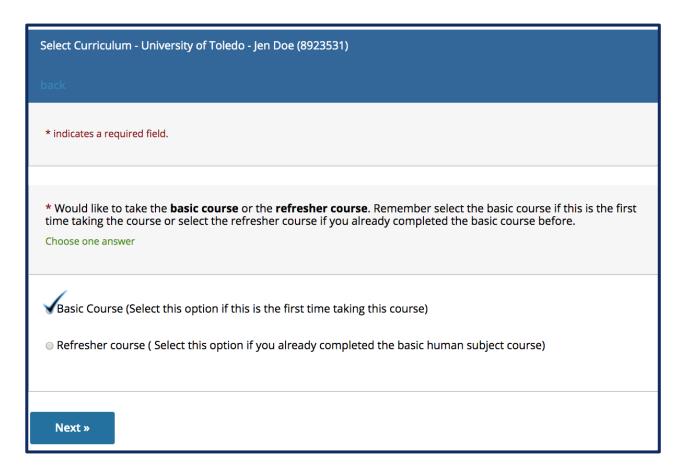
CITI - Learner Registration Steps: 1 2 3 4 5 6 7 * indicates a required field. * To enable the software to present the appropriate course work for your needs, you will be asked a series of questions. Please read the questions carefully and provide the most appropriate answer. Do you conduct research in any of the following settings? Choose all that apply Yes, I conduct research with live human beings, human samples or with data derived from human beings. Tyes, I conduct research or teaching activities that utilizes live, animal subjects or tissues derived from live animal subjects. Yes, I need/want to take the course on Responsible Conduct of Research (RCR), (This is not human subjects training, see option 1 above.) Yes, I need/want to take the course on Conflicts of Interest (COI). Yes, I need/want to take the course on U.S. Export Control. ■ Yes, I need/want to take the course on Good Clinical Practice (GCP). ☐ Yes, I need/want to take a course on Biosafety/Biosecurity. ☐ Yes, I need/want to take a course on Information Privacy & Security. Next

- Select the appropriate training needed
 - In this instance, select the first option.

 Yes, I conduct research with live human beings, human samples or with data derived from human being.



HUMAN SUBJECTS (IRB) TRAINING

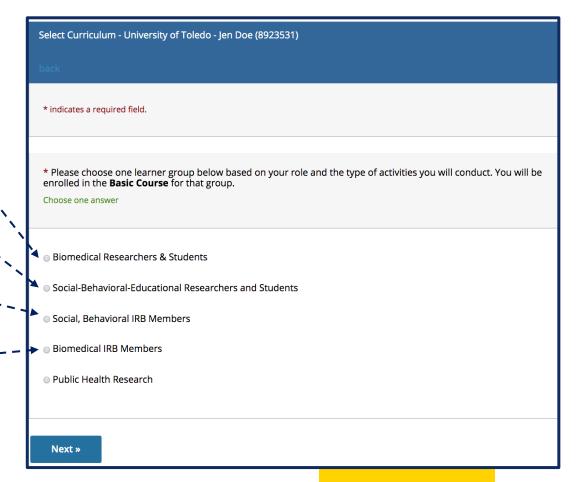


- When taking training that has a BASIC and a REFRESHER option, take the BASIC if you have never taken the course previously or if you have previously taken the course and it expired and it's been longer than 3 years.
 - What's the difference?
 - BASIC = Complete Course
 - REFRESHER = Updates the BASIC course but is not a complete course.
- Left click on the Next button



HUMAN SUBJECTS (IRB) TRAINING

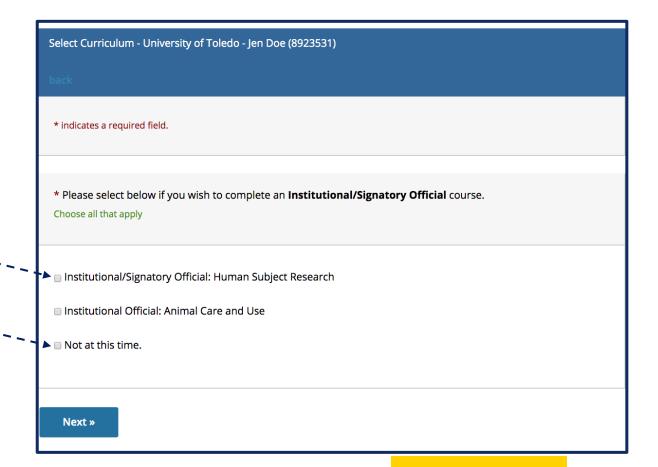
- Select your learner group
 - For most health science campus research, the correct course is Biomedical
 - For most main campus research, the correct course is Social-Behavioral-Educational `\.\` Researchers and Students
 - Members of the Social, Behavioral, Education IRB need to take the Social, Behavioral IRB Members Course
 - Members of the Biomedical or Cancer IRBneed to take the Biomedical IRB Members Course
- Left click on the Next button





HUMAN SUBJECTS (IRB) TRAINING

- Are you an institutional/signatory official for your research project?
 - If **YES**, select "Institutional/Signatory----Official: Human Subject Research"
 - If **NO**, select "Not at This Time" ---
- Left click on the Next button





CONGRATULATIONS



Office of Research and Sponsored Programs

- Congratulations you are finished! You have established your account and selected your training course.
- This account is yours to use throughout your career. If you change institutions, this training moves with you. Just change your affiliation and populate your training. Then complete any modules required by your current institution.



FREQUENTLY ASKED QUESTIONS

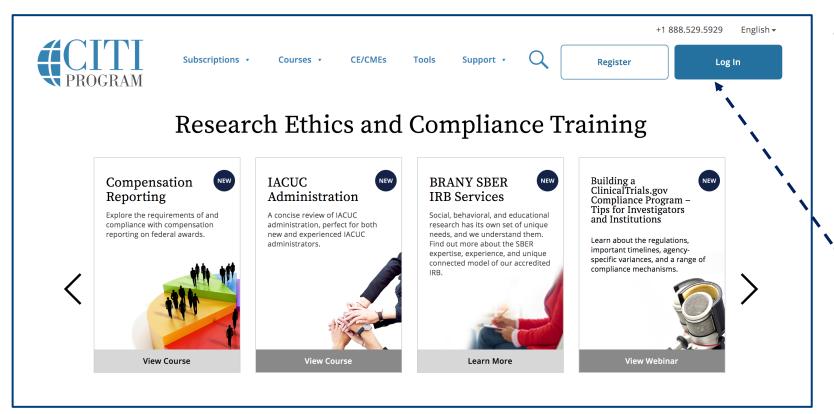


Office of Research and Sponsored Programs





WHAT IF I HAVE AN ACCOUNT FROM ANOTHER INSTITUTION?



- Affiliate your existing account with UToledo. Do not set up a new account. This is how to do this.
 - Log into your
 CITI Account
 www.citiprogram.org



TO AFFILIATE AN ACCOUNT WITH UTOLEDO

Institutional Courses Institutional Courses Institutional Courses are available to learners who have an affiliation with one or more subscribing institutions. If an institution with which you are affiliated is not listed, you may want to add an affiliation. If you are no longer associated with a listed institution, you may want to remove an affiliation. University of Toledo View Courses Would you like to affiliate with another Institution? Add Affiliation Would you like to remove an existing affiliation? Remove Affiliation



Affiliate with an Institution

Home > Profiles > Affiliate with an Institution

To find your organization, enter its name in the box below, then pick from the list of choices provided.

University of Toledo

I AGREE to the Terms of Service for accessing CITI Program materials.

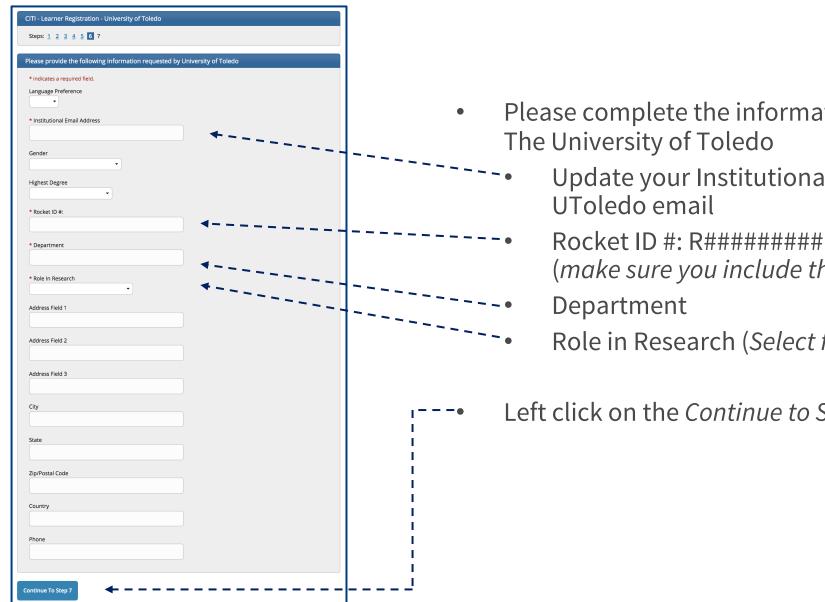
I affirm that I am an affiliate of University of Toledo.

Continue

- Enter *University of Toledo* in the box
- Agree to the Terms of Service
- Affirm that you are an affiliate with UToledo
- Left click on the Continue button



UPDATE UTOLEDO REQUIRED INFORMATION?

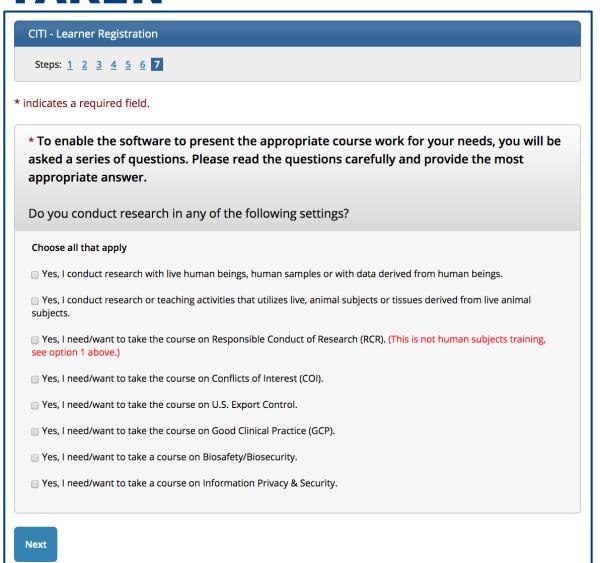


- Please complete the information required by
 - Update your Institutional Email Address to your
 - (make sure you include the R)
 - Role in Research (Select from Drop Down)

Left click on the Continue to Step 7 button



SELECT CURRICULUM TO POPULATE COURSES TAKEN

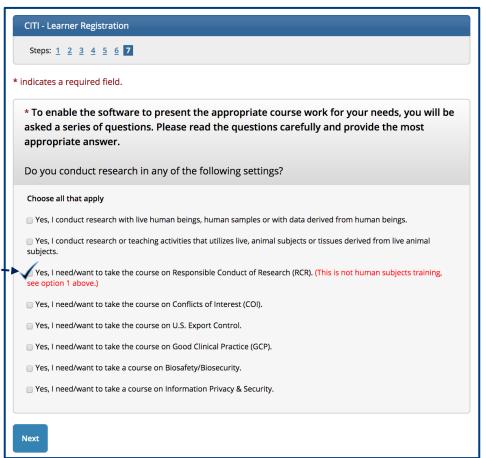


- Select the appropriate training needed
- Left click on the Next button
- Your completed modules will load into your account. Complete any modules required by UToledo. Training requirements differ between institutions and between research sponsors.



I RECEIVED AN EMAIL STATING I NEED TO TAKE RCR TRAINING. ISN'T THIS THE IRB TRAINING I ALREADY TOOK?

- The simple answer = No
- RCR training is Responsible Conduct of Research (RCR) training.
 - Once you select RCR training the next screen—will hive you four options of area of specialization. Select the one that is closest to your area of study or research.





WHAT IF I SELECTED THE WRONG COURSE?

- Log into your CITI account. You will see this screen.
- Left click the View Courses button
- At the bottom of the screen you will see a box titled
 Learner Tools for University of Toledo. In that box, left
 click on "Remove a Course"

Learner Tools for University of Toledo

- Add a Course
- Remove a Course
- View Previously Completed Coursework
- Update Institution Profile
- View Instructions Page
- Remove Affiliation

Institutional Courses Institutional Courses Institutional Courses are available to learners who have an affiliation with one or more subscribing institutions. If an institution with which you are affiliated is not listed, you may want to add an affiliation. If you are no longer associated with a listed institution, you may want to remove an affiliation. University of Toledo View Courses Would you like to affiliate with another Institution? Add Affiliation Would you like to remove an existing affiliation? Remove Affiliation Independent Learner Register as an independent learner to purchase course content. Before you purchase

Register as an Independent Learner



Institutional affiliation. Please note that refunds are not ava

lased as an Independent Learner.

WHAT IF I SELECTED THE WRONG COURSE?



- Log into your CITI account. You will see this screen.
- Left click the View Courses button
- At the bottom of the screen you will see a box titled *Learner Tools for University of Toledo.* In that box, left click on "*Remove a Course*"

Learner Tools for University of Toledo

Add a Course

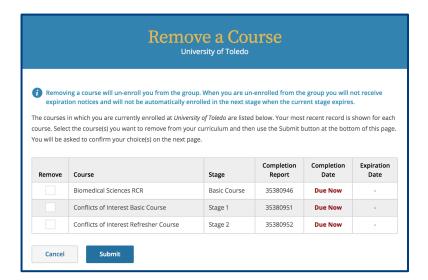
Remove a Course

View Previously Completed Coursework

Update Institution Profile

View Instructions Page

Remove Affiliation



- Select the course or courses you would like to remove.
- Left click on the Submit button. The course is now removed from your account.
 - Once removed, any scores for the course are also deleted and cannot be retrieved.

WHAT IF I NEED TO ADD A COURSE?

Institutional Courses Institutional Courses Institutional Courses are available to learners who have an affiliation with one or more subscribing institutions. If an institution with which you are affiliated is not listed, you may want to add an affiliation. If you are no longer associated with a listed institution, you may want to remove an affiliation. University of Toledo View Courses Would you like to affiliate with another Institution? Add Affiliation Would you like to remove an existing affiliation? Remove Affiliation

- Log into your CITI account. You will see this screen.
- Left click the View Courses button
- At the bottom of the screen you will see a box titled Learner Tools for University of Toledo. In that box, left click on "Add a Course"

Learner Tools for University of Toledo

- Add a Course
- Remove a Course
- View Previously Completed Coursework
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- View Instructions Page
- Remove Affiliatio

	Select Curriculum University of Toledo Question 1	
you	enable the software to present the appropriate course work for your needs, u will be asked a series of questions. Please read the questions carefully and wide the most appropriate answer. you conduct research in any of the following settings?	
	s question is required. Choose all that apply.	
	Yes, I conduct research with live human beings, human samples or with da derived from human beings.	
	Yes, I conduct research or teaching activities that utilizes live, animal subject or tissues derived from live animal subjects.	
	Yes, I need/want to take the course on Responsible Conduct of Research (RCR). (This is not human subjects training, see option 1 above.)	
	(RCR). (This is not numan subjects training, see option 1 above.)	
	Yes, I need/want to take the course on Conflicts of Interest (COI).	
	Yes, I need/want to take the course on Conflicts of Interest (COI).	
	Yes, I need/want to take the course on Conflicts of Interest (COI). Yes, I need/want to take the course on U.S. Export Control.	

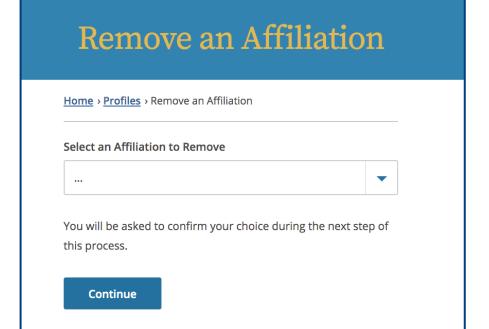
- Select the course(s) you wish to add to your account.
- Left Click on the Next button
- Select "Basic Course" if this is your first time taking this course or "Refresher Course" if you have already completed and passed the Basic Course.
- Left Click on the *Next* button



I AM NO LONGER AT AN INSTITUTION AND WANT TO REMOVE AN AFFILIATION.

Institutional Courses Institutional Courses Institutional Courses are available to learners who have an affiliation with one or more subscribing institutions. If an institution with which you are affiliated is not listed, you may want to add an affiliation. If you are no longer associated with a listed institution, you may want to remove an affiliation. University of Toledo View Courses Would you like to affiliate with another Institution? Add Affiliation Would you like to remove an existing affiliation? Remove Affiliation

- Log into your CITI Account.
 - Left click the *Remove Affiliation* button



- Use the drop down screen and select the institution you would like to remove the affiliation.
- Left click on the Continue button



I AM NO LONGER AT AN INSTITUTION AND WANT TO REMOVE AN AFFILIATION.

Remove an Affiliation

Home > Profiles > Remove an Affiliation

Important: If you remove your affiliation, you will lose access to the following information

- Your courses for DEMO.
- Your Profile for DEMO.

If you want access to the above information again in the future, you will have to reaffiliate with DEMO.

Completion Records for any course(s) that you have already completed for DEMO will remain available on your records page.

Before you remove your affiliation, please note that you are allowed to be affiliated with multiple institutions at the same time. You do not need to remove an affiliation just because you have more than one.

Cancel

Remove my affiliation with DEMO

- You will see this screen. The institution you are removing will appear in white and on the "Remove" button.
- It is NOT NECESSARY to remove affiliations. You can a be affiliated with more than one institution. The only reason to remove an institution is if you no longer want them to have access to your records.
- Be sure to affiliate with a new institution before removing one.
- If you are sure you want to do this, LEFT CLICK on the Remove button.



DO I NEED TO NOTIFY YOU WHEN I HAVE COMPLETED MY COURSE OR SEND YOU A CERTIFICATE?

The quick answer is NO.

CITI will send the Office of Research and Sponsored Programs an email the next morning notifying them of the courses you successfully completed the day before.

- IRB & IACUC Training
 The scores are automatically loaded into our IRB Manager system from CITI.
- Research Compliance Training
 The scores are entered by RSP personnel into the RSP database.



I CAN'T REMEMBER MY USER NAME OR PASSWORD?

USER NAME

• Call Marcie Ferguson at 419.530.1415 or email her at Marcie.Ferguson@UToledo.edu and request your user name. She will email respond to your request at her earliest convenience.

PASSWORD

• Call Marcie Ferguson at 419.530.1415 or email her at Marcie.Ferguson@UToledo.edu and request your account password be reset. She will reset your password at her earliest convenience. You will receive an email from CITI with directions to establish a new password.

FOR QUESTION REGARDING YOUR CITI ACCOUNT, TRAINING ACCESS OR PROOF OF TRAINING.

UTOLEDO – CITI ADMINISTRATION

Marcie Ferguson, B.B.A.

Special Projects Manager
Office of Research & Sponsored Programs

Office: 419.530.1415

Email: Marcie.Ferguson@UToledo.edu

CITI SUPPORT

Support Group: 888.529.5929 | Monday – Friday 8:30 am – 7:30 pm ET



THANK YOU

Marcie Ferguson, B.B.A.
Office of Research and Sponsored Programs

Phone: 419.530.1415

Email: Marcie.Ferguson@UToledo.edu

