## **CITI Program** How to establish a CITI account and register for IRB training courses



Dawn Miller, Executive Assistant II Research & Sponsored Programs September 2024

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## **Creating an account with CITI**



- Proceed to the CITI Program website at <u>www.citiprogram.org</u>
- 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. First email address MUST be UToledo.edu email or Rockets email address.
  - Double-check spelling before continuing to the next screen.
  - Left click on the *Continue to Step 3* button.

CITI - Learner Registration - Unive	ersity of Toledo
Steps: 1 2 3 4 5 6 7	
Personal Information	
* indicates a required field.	
* First Name	* Last Name
* Email Address	* Verify email address
We urge you to provide a second em access the first one. If you forget you address.	ail address, if you have one, in case messages are blocked or you lose the ability to r username or password, you can recover that information using either email
Secondary email address	Verify secondary email address
Continue To Step 3	



## 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

Create your Username a	nd Password
* indicates a required field.	
Your username should cons "a12b34cd". Once created, y	ist of 4 to 50 characters. Your username is not case sensitive; "A12B34CD" is the same as our username will be part of the completion report.
* User Name	
Your password should cons	ist of 8 to 50 characters. Your password IS case sensitive; "A12B34CD" is not the same as
a12034cu .	
* Password	* Verify Password
Please choose a security qui information, you will have	estion and provide an answer that you will remember. NOTE: If you forget your login to provide this answer to the security question in order to access your account.
* Security Question	<b></b>
* Security Answer	



## **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

* indicates a r	equired field.
* Country of	Residence
Search for co abbreviation	ountry: Enter full or partial name (e.g., "United States") OR your country's two or three character (e.g., "US", "USA"), then pick from the list of choices provided.
* May we cor Program cou	ntact you to provide information about other courses and services after you complete your CITI rsework? 📀
U	
© Yes	
○ Yes ○ No	
<ul> <li>Yes</li> <li>No</li> <li>May we cor</li> <li>Program cou</li> </ul>	ntact you about participation in voluntary research surveys after you complete your CITI rsework? 👀
<ul> <li>Yes</li> <li>No</li> <li>* May we cor</li> <li>Program cou</li> <li>Yes</li> </ul>	ntact you about participation in voluntary research surveys after you complete your CITI rsework? 🥹
<ul> <li>Yes</li> <li>No</li> <li>May we cor</li> <li>Program cou</li> <li>Yes</li> <li>No</li> </ul>	ntact you about participation in voluntary research surveys after you complete your CITI rsework? 🥹



## 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

#### CITI - Learner Registration - University of Toledo Steps: 1 2 3 4 5 6 7 \* indicates a required field. \* Are you interested in the option of receiving Continuing Education Unit (CEU) credit for completed CITI Program courses? CITI is pleased to offer CE credits and units for purchase to learners qualifying for CE eligibility while concurrently meeting their institutions training requirements. CE credits/units for physicians, psychologists, nurses, social workers and other professions allowed to use AMA PRA Category 1 credits for re-certification are available for many CITI courses – with that availability indicated on course and module listings. Please register your interest for CE credits below by checking the "YES" or "NO" dots, and, when applicable, types of credits you wish to earn at bottom of page. Please read texts entered for each option carefully. Yes At the start of your course, you will be prompted to click on a "CE Information" page link located at the top of your grade book and to VIEW and ACKNOWLEDGE accreditation and credit designation statements, learning objectives, faculty disclosures, types, number and costs of credits available for your course. Yes No The CE functionality will not be activated for your course. Credits and units will therefore not be available to you for purchase after you start your course. You can change your preference to "YES" before such time however by clicking on the "CE Credit Status" tab located at the top of your grade book page. No If you picked "YES", please check below the one type of credit you would like to earn MDs, DOs, PAs - AMA PRA Category 1 Credits TM Psychologists – APA Credits Nurses – ANCC CNE Other Participants – Certificates of Participation Social Workers – Florida Board of Clinical Social Work, Marriage & Family Therapy and Mental Health Counseling Continue To Step 6

## Step 6: UToledo required information

- Please complete the information required by The University of Toledo
  - Institutional Email Address (UToledo Email)
  - Rocket ID #: R######### (make sure you include the R)
  - Department
  - Role in Research (Select from Drop Down)
- Left click on the *Continue to Step 7* button



Name and the fall the fall	6		 _
Please provide the following in	formation requested by U	niversity of Toledo	
* indicates a required field.			
Language Preference			
Institutional Email Address			
Gender			
Highest Degree			
-			
* Rocket ID #:			
* Department			
* Role in Research			
	•		
Address Field 1			
Address Field 2			
Address Field 2			
Address Field 3			
City			
State			
Zip/Postal Code			
Country			
Phone			

## **Step 7: Select curriculum**

- Select the appropriate training needed
  - For IRB you will select the first option in ADDITION to option #3 & #4.
  - RCR (OPTION #3 is required every four years)
  - COI (OPTION #4 is required every four years)

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#### **CITI - Learner Registration**

#### Steps: <u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> 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.

Yes, 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).

See Yes, I need/want to take a course on Biosafety/Biosecurity.

Pres, I need/want to take a course on Information Privacy & Security.

Next

## 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

ates a required field.
uld like to take the <b>basic course</b> or the <b>refresher course</b> . Remember select the basic course if this is the fir
taking the course or select the refresher course if you already completed the basic course before.
sic Course (Select this option if this is the first time taking this course)
resher course ( Select this option if you already completed the basic human subject course)
F



## 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 IRB need to take the Biomedical IRB Members Course
  - Left click on the Next button

Select Curriculum - University of Toledo - Jen Doe (8923531)
* indicates a required field.
* Please choose one learner group below based on your role and the type of activities you will conduct. You will be enrolled in the <b>Basic Course</b> for that group.
Choose one answer
Biomedical Researchers & Students
Social-Behavioral-Educational Researchers and Students
Social, Behavioral IRB Members
Biomedical IRB Members
Public Health Research



Next »

## 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

ack		
* indicates a require	field.	
* Please select be	w if you wish to complete an Institutional/Signatory Officia	l course.
Choose all that appl		

Institutional Official: Animal Care and Use

Not at this time.

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#### Next »

## 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
   <u>www.citiprogram.org</u>

## To affiliate an account with UToledo

#### 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 <u>add an affiliation</u>. If you are no longer associated with a listed institution, you may want to <u>remove an affiliation</u>. University of Toledo

Add Affiliation

**Remove Affiliation** 

Would you like to affiliate with another Institution?

Would you like to remove an existing affiliation?

• Left click the Add Affiliation button

- 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 The University of Toledo
  - Update your Institutional Email Address
     to your UToledo email
  - Rocket ID #: R######### (make sure you include the R)
  - Department
  - Role in Research (Select from Drop Down)
- Left click on the *Continue to Step 7* button



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hease provide the following in	ormation requested by Un	wersity of Toledo	
* indicates a required field.			
<b>_</b>			
* Institutional Email Address			
Gender			
	•		
Highest Degree			
•			
* Rocket ID #:			
* Department			
* Role In Research			
	•		
Address Field 1			
Address Field 2			
Address Field 3			
City			
State			
Zip/Postal Code			
Country			
Phone			

# 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.

#### CITI - Learner Registration

#### Steps: <u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> 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.

Yes, 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).
- Sec. I need/want to take the course on U.S. Export Control.

PYes, I need/want to take the course on Good Clinical Practice (GCP).

Pres, I need/want to take a course on Biosafety/Biosecurity.

Security.

Next



## 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 give you four options of area of specialization. Select the one that is closest to your area of study or research.

# 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. Yes, 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.)

- $\hfill \ensuremath{\square}$  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



## 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"



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



- <u>Remove a Course</u>
- <u>View Previously Completed Coursework</u>

Learner Tools for University of Toledo

- Update Institution Profile
- <u>View Instructions Page</u>
- <u>Remove Affiliation</u>



## What if I selected the wrong course?

#### 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 <u>add an affiliation</u>. If you are no longer associated with a listed institution, you may want to <u>remove an affiliation</u>.

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
   *"Remove a Course"*
- Learner Tools for University of Toledo
- Add a Course
- Remove a Course
- <u>View Previously Completed Coursework</u>
- Update Institution Profile
- <u>View Instructions Page</u>
- <u>Remove Affiliation</u>

	Uni	versity of Toledo			
Removi expirati	ng a course will un-enroll you from the grou on notices and will not be automatically en n which you are currently enrolled at <i>Univers</i>	up. When you are un- rolled in the next sta ity of Toledo are listed	enrolled from the ge when the curr below. Your mos	e group you will r ent stage expires t recent record is	not receive 5. shown for eac
rse. Selec	t the course(s) you want to remove from you	r curriculum and ther	n use the Submit b	outton at the botto	om of this pag
e courses i Irse. Selec I will be as Lemove	t the course(s) you want to remove from you ked to confirm your choice(s) on the next pa Course	r curriculum and ther ge. Stage	Completion Report	Completion Date	om of this pag Expiration Date
courses i rse. Selec will be as emove	t the course(s) you want to remove from you ked to confirm your choice(s) on the next pa Course Biomedical Sciences RCR	r curriculum and ther ge. Stage Basic Course	Completion Report 35380946	Completion Date Due Now	om of this pag Expiration Date -
courses i rse. Selec will be as emove	t the course(s) you want to remove from you ked to confirm your choice(s) on the next pa Course Biomedical Sciences RCR Conflicts of Interest Basic Course	r curriculum and ther ge. Stage Basic Course Stage 1	Completion Report 35380946 35380951	Completion Date Due Now Due Now	Expiration Date -

- 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 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 <u>add an affiliation</u>. If you are no longer associated with a listed institution, you may want to <u>remove an affiliation</u>.



#### 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"

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Learner Tools for University of Toledo

- Add a Course
- <u>Remove a Course</u>
- <u>View Previously Completed Coursework</u>
- Update Institution Profile
- <u>View Instructions Page</u>
- <u>Remove Affiliation</u>



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- 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.

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

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



Institutional Courses				
Institutional Courses are available to learners who have a more subscribing institutions. If an institution with which listed, you may want to <u>add an affiliation</u> . If you are no lo institution, you may want to <u>remove an affiliation</u> .	an affiliation with one or you are affiliated is not onger associated with a listed			
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			

Remove an Affilia	ation
Home > Profiles > Remove an Affiliation	
Select an Affiliation to Remove	
	•
You will be asked to confirm your choice during the this process.	e next step of

# I am no longer at an institution and want to remove an affiliation.

- 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.



### Remove an Affiliation

DEMO

#### 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 <u>records</u> 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.

## 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 username or password?

## **USER NAME**

 Call Dawn Miller at 419.530.6171 or email <u>RSPTraining@UToledo.edu</u> and request your user name.

## PASSWORD

• Call Dawn Miller at 419.530.6171 or email <u>RSPTraining@UToledo.edu</u> and request your account password be reset. 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**

Dawn Miller, Executive Assistant, II Office of Research & Sponsored Programs

Office: 419.530.6171 Email: <u>RSPTraining@UToledo.edu</u>

#### **CITI SUPPORT**

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



## **THANK YOU**

Dawn Miller, Executive Assistant II Office of Research and Sponsored Programs Phone: 419.530.6171 Email: <u>RSPTraining@UToledo.edu</u>

