



Interdisciplinary Health Sciences Initiative (IHSI)

Health Sciences Research Guide

2016-2017 Academic Year



HEALTH SCIENCES RESEARCH GUIDE

The Interdisciplinary Health Sciences Initiative (IHSI) supports faculty-driven research at Illinois by organizing our campus around health challenges, team-building, coordinating projects, and managing grant efforts. IHSI makes a point to fuse technological advances with health science research and fosters medical breakthroughs to help people help themselves. IHSI catalyzes, connects, supports, and engages health sciences research at the University of Illinois Urbana-Champaign.

As part of its support of health sciences endeavors at Illinois, IHSI has compiled information from departments and offices across campus and placed it in one accessible location for the convenience of researchers. The information outlines the required steps for research set up and administration in the health sciences, many of which are needed BEFORE engaging in research at the University of Illinois and/or clinical partners. The information is subject to change periodically, so please click on the links for the most up-to-date information. If you notice a piece of information that needs to be updated, please contact IHSI at healthinitiative@illinois.edu.

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RESEARCH SETUP

KEEP IN TOUCH WITH YOUR IHSI RESEARCH DEVELOPMENT MANAGER

The Interdisciplinary Health Sciences Initiative (IHSI) catalyzes, connects, supports, and engages health sciences research on the University of Illinois at Urbana-Champaign campus. To assist with this mission, IHSI has a team of research development managers who work closely with faculty and administration in a number of essential ways that include:

- Growing the health sciences research communities and programs
- Identifying, expanding, and supporting emerging research initiatives
- Connecting potential collaborators
- Fostering connections between academic researchers and clinical partners
- Initiating, guiding, and advising clinical studies (including internal seed funding projects)
- Identifying grant funding opportunities and supporting application submissions
- Supporting new interdisciplinary, multi-year proposals and strategies
- Assisting with the creation and coordination of large center-type proposals
- Building capacity in health sciences research communities and programs
- Acting as the liaison between external partners and organizations including Carle and Mayo Clinic
- Leading and supporting programs and events designed for faculty development

For more information or to utilize our services, contact a research development manager listed below or email healthinitiative@illinois.edu.



Cancer, Health Equity, and Community Projects
Margaret Browne Huntt, Senior Research Development Manager
(217) 244-1354 or mbrowne@illinois.edu



Clinical and Translational Neuroscience
Gillian Cooke, Research Development Manager
(217) 300-6709 or gcooke@illinois.edu



Precision Medicine
Maggie Berg Miller, Research Development Manager
(217) 333-9201 or meberg@illinois.edu

IHSI has also identified emerging topic areas and is facilitating and coordinating research in digestive and metabolic health (for more information contact [Maggie Berg Miller](#)) and heart and vascular health (for more information contact [Tor Jensen](#)). Within these program and topic areas, IHSI is helping investigators find collaborators, connect with clinical partners, assess feasibility, locate mentors, get help with clinical study education, identify and secure grant funding opportunities, and much more. Visit the [IHSI website](#) for more information.

HUMAN SUBJECTS ETHICS TRAINING

There are a number of ethics training and education courses that are available. The nature of your research—and the participants you are working with—will dictate which course(s) you will be required to complete. Outlined here is some of the basic information about ethics training and links to where you can find more details.

Who Manages Ethics Training and Education in Research?

University of Illinois at Urbana-Champaign

The [Office for the Protection of Research Subjects](#) (OPRS), while performing administrative functions of the Institutional Review Board (IRB), serves as the official oversight office for human subject research (HSR) at Illinois. Three important points are:

- Human subject researchers must complete training and education requirements every three years
- Research will not be approved until the training requirements are met. Documentation of training must be provided to the IRB Office with all new applications or renewals.
- Human subject research training completed at other institutions within the last three years may meet some of these training requirements.

Carle Research

The [Research Office at Carle](#) provides guidelines for anyone interested in research at Carle. In addition to providing information about necessary requirements, there are also links to templates and forms required to develop Carle related IRB applications. There is also information about the [training](#) required by Carle.

The research development managers at IHSI are also available to help you navigate the process of conducting research at Carle. See page 4 for specific contact information.

Mandatory Training

The [Collaborative Institutional Training Initiative](#) (CITI Program) at the University of Miami is a leading provider of research education content. You will use this portal to complete most of the mandatory training as required by OPRS. The OPRS has outlined instructions for completing the [CITI training](#).

- If you do not already have a CITI account, you will need to create a username and password. This site will keep track of all the training modules you have completed. If you ever need to show proof of completion of these modules (sometimes needed for IRB applications), you can access and print certifications through your account.

What Do I Need To Complete In CITI?

Upon logging in for the first time, you will need to select a university with which to affiliate yourself—enter University of Illinois at Urbana-Champaign. You will be presented with a series of questions or options to enable you to enroll in the Learner Group appropriate to your interests or your role in human subject research/lab-animal welfare, or other curriculum as decided by your institution.

Your institution has prescribed your course curriculum. Your role in research does not affect your curriculum choices. The course(s) you are enrolled in depends only on your answers to the "Select Curriculum" questions (e.g. social and behavioral research or biomedical research).

Select Curriculum:

Item 1: Core Basic Training—Select either 'social and behavioral research' or 'biomedical research'. One of these courses must be taken before any other CITI courses.

In addition to the basic training course, these courses are required in order to complete your Social and Behavioral Core CITI Training:

- Belmont Report and CITI Course Introduction (ID: 1127)
- History and Ethical Principles - SBR (ID: 490)
- Defining Research with Human Subjects - SBR (ID:491)
- Assessing Risk in Social Behavioral Sciences - SBR (ID: 503)
- Informed Consent - SBR (ID: 504)
- Privacy and Confidentiality - SBR (ID: 505)

In addition to the basic training course, these courses are required in order to complete your Biomedical Core CITI Training:

- Belmont Report and CITI Course Introduction
- History and Ethics of Human Subjects Research
- Informed Consent
- Privacy and Confidentiality - SBE
- Social and Behavioral Research (SBR) for Biomedical Researchers
- Recognizing and Reporting Unanticipated Problems Involving Risks to Subjects or Others in Biomedical Research

Item 2: Additional Elective—Completion of Core Basic Training is required before selecting these modules.

Additional CITI modules that are necessary if appropriate to the investigator's research.

Item 3: Responsible Conduct of Research Course—For most people the answer will be N/A.

If you want to take the Responsible Conduct of Research Course, please make your selection below.

Choose one answer:

- Biomedical Responsible Conduct of Research Course
- Social and Behavioral Responsible Conduct of Research Course
- Physical Science Responsible Conduct of Research Course
- Humanities Responsible Conduct of Research Course
- N/A

Item 4: Financial Disclosure and Conflicts of Interest Course.

While there is an option to take this course in CITI, there is also a University of Illinois [training module](#)

that is considerably shorter. Designed to help learners satisfy the training requirements associated with the U.S. Public Health Service (PHS) regulations. These regulations require additional financial disclosure and training for anyone involved in the design, conduct and analysis of PHS-funded research, including PIs, co-PIs, academic professional research staff, postdoctoral research associates, and graduate research assistants. Researchers are encouraged to complete the training on the [these pages](#). This training is also required for investigators receiving funding from [sponsors](#) who have decided to follow the PHS regulations, though you should independently verify the inclusion of PHS regulations in the proposal and award terms.

Item 5: Lab Animal Welfare Course Enrollment.

This will depend upon the nature of your research. For most people the answer will be N/A.

Item 6: CITI Export Control Course

For most people the answer will be N/A. Scroll down and click submit.

Validation Screen

This next screen will validate your registration. If you want to register with another institution click "Yes"; if not, click "No" to continue.

Affiliating with another Institution

You may need to affiliate with other institutions that you are collaborating with such as the Mayo Clinic or Carle—this allows you to ensure that you have done their basic training, and to verify if there are any additional institute-specific modules that you might need to take. When you affiliate with another institution, such as Carle Foundation, you will be able to add on additional required modules (it should recognize that you have already completed the University of Illinois at Urbana-Champaign training).

Item 1: Research personnel who have completed core training for University of Illinois at Urbana-Champaign.*(Participants in this user group must send a copy of their University of Illinois at Urbana-Champaign CITI completion page to IRB@Carle.com for proof of training). The core training to affiliate with Carle includes the Carle Foundation Hospital IRB Policy Training and the Research and HIPAA Privacy Protections.

Item 2: Conflicts of Interest course.

Conflict of Interest training is required for those researchers who plan to apply for federal funds from the Public Health Service (PHS) to support their research or for those researchers who are currently engaged in research on PHS funded projects. Sources of PHS funding for research include the National Institute of Health (NIH), Centers for Disease Control and Prevention (CDC) and Agency for Healthcare Research and Quality (AHRQ).

Item 3: Good Clinical Practice Course

Optional

Item 4: Institutional/Signatory Officials

For most people the answer will be N/A. Scroll down and click submit.

Complete Your Course List

Click the Title of the Course to begin or continue the course.

Please **Complete the Integrity Assurance Statement** presented at the top after clicking a course title. The system will allow you to start taking the course modules after completing it.

You will need to complete the required and elective modules, and associated quizzes before you can print off your certificate of completion. A minimum passing score of 80% is required for a certificate of completion. You **MUST download** a version of this report and submit to the IRB before engaging in research. Education Certificates from Carle Affiliated CITI accounts are sent automatically to the Carle CITI Administrator. In addition all investigators conducting research at Carle (including key research personnel) must have a current [Conflict of Interest Disclosure form](#) on file. Submit completed forms to research@carle.com.

Other Resources in CITI

The Main Menu also provides a number of **Learner Tools** designed to help you.

1. The **Add a Course or Update Learner Groups** link allows you to go to the enrollment questions and change your “Learner Group” by providing new responses to the enrollment questions.
2. The **View Previously Completed Coursework** link allows you to see your past scores, view expirations, and print completion reports.
3. The **Update Institution Profile** link allows you to update your institution-specific details, such as your institutional ID or employee number, email, department, role in research, etc.
4. The **View Instructions** page link brings you back to this page.
5. The **Remove Affiliation** link allows you to un-affiliate with an institution if you are no longer required to be certified under them and wish to no longer receive email notifications regarding courses under the institution.

Check for specialized training

On occasion, particular protocols will have specialized training that must be completed prior to enrolling subjects. This is often the case with clinical trials requiring further electronic training on good clinical practices—be sure to consult the study protocol to ensure that you are following the official guidelines. In general, it is a good idea to keep a spreadsheet of the different training courses that your staff and students have completed—this may be helpful when planning who does what in your lab.

Source: Content curated and edited from the [Office for the Protection of Research Subjects](#), the [Research Office at Carle](#), and the [Collaborative Institutional Training Initiative](#).

GOOD CLINICAL PRACTICE

[Good Clinical Practice](#) (GCP) is an international ethical and scientific quality standard for designing, conducting, recording and reporting trials that involve the participation of human subjects. Compliance with this standard provides public assurance that the rights, safety and well-being of trial subjects are protected, consistent with the principles that have their origin in the Declaration of Helsinki, and that the clinical trial data are credible. The objective of this International Conference on Harmonization GCP Guideline is to provide a unified standard for the European Union (EU), Japan and the United States to facilitate the mutual acceptance of clinical data by the regulatory authorities in these jurisdictions. This is a good resource for you to have on hand.

RESEARCH INTEGRITY AND RESEARCH MISCONDUCT

University of Illinois students, faculty, and staff are expected to assure quality and [integrity in their research](#) and publications by self-regulation and adherence to individual ethical codes and professional standards. Individuals in leadership or supervisory positions have a special obligation to foster academic integrity in their relationships and in their work.

If you are working with NSF, NIH and USDA funding, you are required to complete the Responsible Conduct of Research training. Guidelines are provided [here](#).

Source: Content curated and edited from the [Office of the Vice Chancellor for Research](#).

IRB APPROVAL AT ILLINOIS

The University of Illinois at Urbana-Champaign Institutional Review Board (IRB) is responsible for protecting the rights and welfare of human subjects participating in research conducted by affiliated faculty, staff and students. To fulfill these responsibilities, the [IRB](#) reviews all the research documents and activities that bear directly on the rights and welfare of the subjects of proposed research. The application or protocol, the consent/assent document(s), research equipment form, tests, surveys, questionnaires and similar measures, and recruitment documents are examples of documents that the IRB reviews.

After you have prepared all of your IRB application materials, they may be reviewed using one of three [IRB Review Processes](#): full board review, expedited review, or exempt review. The review path is determined by:

- Level of risk to subjects associated with the protocol
- The type of research being conducted, e.g., educational or medical intervention, survey, ethnographic observation, etc.
- The sensitivity of the research questions or complexity of the research design
- The involvement of vulnerable populations as research subjects

Each IRB committee meets on a monthly basis. You will find details about whom to contact on their [website](#). All general correspondence and questions may be addressed to: irb@illinois.edu. IRB approval must be obtained before engaging in research—this includes all recruitment and advertising.

The main form that needs to be completed and approved is called **New Protocol Form**, you can find this, and all other standardized forms and templates on the [website](#).

Other information that you will need to include with the first application includes:

- The complete grant application (if applicable), contract, deliverables, or other documentation of funding application for externally funded research.
- Relevant consent forms and scripts.
- All measures, such as surveys, interview protocols, inventories, and descriptions of experiments that are not already included on the New Protocol Form under Procedures.
- Recruiting materials. If advertising materials are not proofed and ready (e.g. written advertisements, radio, television, etc.), the information to be included in these materials can be submitted until the final versions are available and can then be submitted. For example: "Advertisements will include the following information...as space allows."
- As applicable, documentation of permissions and approvals from outside institutions and their IRBs, or a statement about the status of these approvals, if pending.

Other [forms](#) that you will likely need to fill out depending upon the study include:

- Research Team Attachment
- Research Equipment Form
- Drug and Chemical Usage Form
- Biological Materials Form

Each time you wish to make a change to your study, you will need to get IRB approval **before** you can implement these changes (e.g. recruit at a new location, add in additional testing materials, etc.)—when this occurs, you will need to use the [Protocol Amendment Form](#). Many of these small changes can undergo expedited review.

Keep in mind the following:

- If you are working with multiple sites then you must consult the IRB at all sites—it may be that your protocol needs to get reviewed at both, or that one IRB will defer to the decisions made by the other.
- There are deadlines by which the IRB must receive your documents before it can be considered at the next full board review (assuming that it needs to go to a full board). These are typically 5-6 weeks before the meeting so plan accordingly.
- The PI will need to sign many of these forms, but the **full application can then be scanned (where necessary) and emailed to irb@illinois.edu**.
- At the Urbana campus at Illinois, a tenure-track faculty member may serve as PI; however, others (research associate, postdoctoral research associate, research scientist, and academic professional) can seek permission from their applicable academic dean, institute director, or campus administrative officer (others, such as lab managers can be the main point of contact)
- The [Campus Administrative Manual](#) has clear guidance on eligibility to serve as PI.
 - If you are a student, undergraduate or graduate, you are unable to serve as the PI on the study, but you can be considered a co-investigator.
- All team members have to complete their IRB training **BEFORE** being listed on the research team.
- The IRB may require further clarification before approval, in this case, PIs and all of those listed as points of contact will be contacted with questions and concerns.
- Each project must go through a renewal process at least once a year—even if you have finished collecting data. The IRB will email you the renewal forms before the due date, and the forms can also be downloaded [online](#). The time between renewals will depend upon the nature of your research.
- Any study that is considered to be a clinical trial must be listed on <https://clinicaltrials.gov/>. You can register a study on ClinicalTrials.gov at any time. Please note that, in general, [Section 801](#) of the Food and Drug Administration Amendments Act requires Applicable Clinical Trials to be registered within 21 days of enrollment of the first participant. In addition, the International Committee of Medical Journal Editors and other journals require registration of clinical trials prior to enrollment of the first participant.
- You **MUST** receive approval **BEFORE** recruiting subjects—this includes approval of all recruitment material—ads, fliers, emails, etc.

Source: Content curated and edited from the [Office for the Protection of Research Subjects](#).

ADVERSE EVENTS

While every effort is made to ensure that adverse events do not happen, occasionally unforeseen events happen. Reporting adverse events is often the responsibility of the researchers/coordinators that deal most often with subjects (see the flowchart created by the [Exercise Psychology Laboratory](#) for an example of a printable summary that can be used in your lab space).

Classification of an Adverse Event

Adverse event: Any physical, psychological, or social harm to subjects during the course of research.

Adverse Event vs. Serious Adverse Event:

See flow chart to determine if an event is considered serious, and thereby requires different reporting.

Expected vs. Unexpected event:

Expected: An event may be expected in accordance with a specific project and is reflected in the IRB application documents or in the informed consent document.

Unexpected: An event is unexpected when its specificity and severity are not accurately reflected in the IRB application documents or in the informed consent document.

Reporting Adverse Events and Unanticipated Problems

Principal investigators must report the following types of events to the [Institutional Review Board](#) as soon as possible:

- Adverse events which in the opinion of the principal investigator are both unexpected and related to the research.
- An unanticipated event related to the research that exposes individuals other than the research subjects (e.g., investigators, research assistants, students, the public, etc.) to potential risk.
- A breach of confidentiality.
- Change to the protocol taken without prior IRB review to eliminate an apparent immediate hazard to a research subject.
- Protocol violation (meaning an accidental or unintentional change to the IRB approved protocol) that harmed subjects or others or that indicates subjects or others may be at increased risk of harm.

Serious adverse events (occurring within 48 hours of participation in the research) must be reported to the IRB immediately, with a [written report](#) by the PI within 24 hours of the PI becoming aware of the event. Serious adverse events are (1) death of a research participant; or (2) serious injury to a research participant.

All other non-serious unanticipated problems should be reported to the IRB within 2 weeks of the first awareness of the problem by the Protocol PI or another researcher, OPRS, or a member of the IRB. Prompt reporting is important, as unanticipated problems often require some modification of study procedures, protocols, and/or informed consent processes. Such modifications require the review and approval of the IRB.

The IRB will accept other reports when the investigator is unsure whether the event should be reported. A summary of all adverse events (serious or not) must be submitted with your IRB renewal.

Source: Content curated and edited from the [Office for the Protection of Research Subjects](#).

BIOMEDICAL RESEARCH CENTER

The Biomedical Research Center (BRC) is a state-of-the-art research facility with over 17,000 square feet of space. This space, which is located in the Mills Breast Cancer Center at Carle Hospital, is divided into two larger open laboratories designed with adaptable bench space. Here, Illinois researchers and Carle physician researchers are co-located with access to specialty rooms such as a cold room, warm room, cell culture alcoves, fume hood alcoves and microscopy room. Currently, the BRC has seven Illinois faculty users representing four colleges on campus, and seven Carle physician users.

Support and oversight is provided by the Interdisciplinary Health Sciences Initiative Biomedical Research Laboratory director, [Tor Jensen](#). Basic equipment is provided in the Biomedical Research Center to assist researchers with the startup of their own laboratory space. This equipment includes such items as biological safety hoods, cryopreservation storage, -20 and -80 freezers, refrigerators, centrifuge and microscopy.

Services which may be provided to interested researchers include, consenting, de-identification of data, biohazard waste disposal, research billing, statistical support, tissue transfer, cell sorting, study design development, manuscript preparation, grant identification and submission, and educational seminars.

For more information and a complete list of resources at the BRC, contact Tor Jensen at (217) 722-3231 or torwolf@illinois.edu.

ANIMAL RESEARCH AT ILLINOIS

Institutional Animal Care and Use Committee

All research, teaching, and outreach activities involving vertebrate animals on the Urbana campus must receive approval from the [Institutional Animal Care and Use Committee](#) (IACUC) before initiation of the activity.

A resident faculty member acting as the responsible PI must prepare and submit a protocol once the need to use animal subjects is determined. The PI will [login](#) to create a new protocol. The lead faculty member on the project must be the person that starts the process because the system will automatically assign the role of PI to the creator of the protocol. Once created, the PI can assign "Senior Personnel" who will have access to edit and complete the remainder of the protocol. The PI has sole responsibility for the content of the protocol and is the only person that may submit the completed protocol.

Information required for completing a protocol:

- Project overview
- List of species, sources and numbers ([view approved sources](#))
- Rationale for the species
- Rationale for the number of animals ([View the Regulation](#))
- Description of use
- Exceptions to policies, standards, or procedures
- Regulated agents
- Surgical procedures
- Clinical outcomes
- Minimization of pain
- Veterinary care
- Care and use facilities
- Field studies
- Disposition of animals
- Ag animal usage
- Funding sources
- Personnel participation and experience

All individuals listed in the protocol will need to complete mandatory training. See the [training requirements for Animal Care and Use](#). All individuals involved in research or teaching activities that use animals must complete the Institutional Animal Care and Use Committee (IACUC) online training module [Basic Training Program for Animal Users](#). The Animal Care and Use [Occupational Health and Safety \(OHS\) Program](#) is also mandatory, and all participants must complete the Animal Care and Use [Risk Assessment Form](#), which is used to evaluate the possible health risks due to animal exposures and occupational hazards. Depending on the project, participants may also be required to follow the Division of Research Safety (DRS) [Biological Safety Training](#).

The portal to access the mandatory programs and forms requires ID authentication. Access is restricted to University of Illinois faculty, students, staff, and authorized guest users (e.g. Carle Foundation). Contact the [IACUC](#) to set up a guest account.

There are also a number of [additional training opportunities](#) that are currently offered upon request through the Division of Animal Resources (DAR), typically one-on-one or small group sessions. Training questions or requests may be directed to: daradministratorsmailinggroup@mx.uillinois.edu

Protocols and amendment requests should be sent to IACUC@illinois.edu. See the [online FAQs](#) for further details.

Division of Animal Resources

The [Division of Animal Resources](#) (DAR) is responsible for ensuring high quality animal care and providing training and consultation on the safe, humane use of laboratory animals in research and education in compliance with federal regulations and campus policies. They charge a per-diem rate to house animals and can assist in ordering animals from an approved vendor, importing animals from another source, or exporting animals to another institution. See [DAR's online FAQs](#) for further details.

Source: Content curated and edited from the [Division of Animal Resources](#) and the [Institutional Animal Care and Use Committee website](#).

LABORATORY SAFETY

The [Division of Research Safety](#) (DRS) provides much of the necessary information that you might need if you:

- work in a lab (create and maintain a safe laboratory environment)
- run a lab (promote safety and ensure regulatory compliance)
- if your work takes you into labs (create and maintain a safe laboratory environment)

At a minimum you may need to complete some general lab safety training if you are working with biological/chemical/radiological materials prior to, or within the first month of working in the laboratory.

The DRS will tell you what training you need to do, how to organize waste pick up, and how to respond in an accident (the appropriate steps to take and how to report the accident). Outlined on the website is both your responsibilities, and the University, State and Federal requirements. They also offer a range of safety training programs that cover basic lab safety, up to working with lasers, radiation and hazardous materials. To access all of this and more, see their [website](#).

The best place to start is the [training questionnaire](#)—based upon your answers to this, the DRS will recommend all necessary training—much of which can be completed online.

Source: Content curated and edited from the [Division of Research Safety](#).

INTERNAL AND EXTERNAL FUNDING

If you are looking for information about upcoming grants, a great place to start includes the IHSI [Research Resources page](#), the [funding and opportunities email](#) and the [limited submission email alerts](#) from the Office of the Vice Chancellor for Research, and email alerts from various granting agencies (e.g. [National Science Foundation](#), [National Institutes of Health](#), etc.).

At Illinois, there are a number of resources available to help you in your grant process:

- IHSI's [research development managers](#) are here to help, feel free to reach out to them to learn more about grant opportunities, faculty and clinician matches, and a host of other services.
- Each department/school also typically has its own grant/contracts specialists—these specialists can be an incredible resource, and are worth contacting from the outset of any proposal.
- The [Office of Proposal Development \(OPD\)](#) also works with members of the University research community to support interdisciplinary “mega-proposals”, respond to grant announcements of strategic importance to the campus, and foster campus-wide community among those involved in research development.

Internal Funding

The University of Illinois supports innovative research in a number of ways. [Campus funding](#) helps faculty and research staff advance new ideas, complete important preliminary studies to attract external support, and supplement resources available from other sources. Below are details of some of these programs, but please consult the [full list](#) for more options.

Campus Research Board

Another great source for funding is the [Campus Research Board](#). The maximum award is \$30,000 and there are up to four funding opportunities throughout the year, depending upon the program. The information sessions that are offered throughout the year can answer many questions that you might have about the process. Details for upcoming sessions are provided [online](#).

Carle Illinois Collaborative Research Seed Program

The Carle Illinois Collaborative Research Seed Program welcomes research proposals from a broad array of disciplines and clinical areas. The aim is to:

- Foster collaboration between Carle clinicians and Illinois researchers
- Support innovative approaches to the challenges facing clinical care
- Promote opportunities to improve positive health outcomes
- Acquire preliminary data for a subsequent external collaborative grant application
- Stimulate significant external research or clinical trial funding from either government or corporate sources

All proposals must have a lead investigator from Carle and a lead investigator from Illinois, with the expectation that all projects reflect a true collaborative partnership (i.e., that investigators from both institutions will play significant and essential roles in the project). The program will not provide interim or incremental support for existing research programs or projects that do not represent a significant opportunity for future expanded externally funded research. Projects should not anticipate additional internal funding after the seed money is exhausted.

Questions regarding this seed funding program should be directed to healthinitiative@illinois.edu.

External Funding

SPIN Database

The Office of Proposal Development subscribes to a database of grant opportunities called [SPIN](#) (Sponsored Program Information Network). Not only can you use SPIN to search for funding opportunities, you can also set up alerts to automatically notify you of grants related to a specific search term or category. By leveraging data in the SPIN funding opportunities database, users can configure automation for any SPIN saved search to generate daily or weekly email notices of newly-added or modified opportunities that meet the criteria of the saved search. This is a great way to stay up-to-date on funding opportunities in your research area.

Useful tips:

- SPIN can be accessed from any computer/IP address, whether on campus or not. Simply create a profile (username and password) to gain access.
- Use the advanced search option to refine your search and narrow the list of funding opportunities returned.
- Use the keyword search to find funding opportunities curated by SPIN/InfoEd staff that correlate with predetermined keyword categories, even if the keyword is not specifically listed in the funding announcement.
- Watch the training videos under the Help tab on the SPIN website to get the most out of the database.

For more information and to access SPIN, visit the [Office of Proposal Development website](#), or email [Suzanne Berry-Miller](#) with any questions.

Office of Sponsored Programs

The Office of Sponsored Programs (OSP) provides pre-award and non-financial post-award administrative services for sponsored projects on the Urbana campus. OSP works in close collaboration with a number of other central campus offices and with unit personnel to facilitate the overall effective coordination of research administration services, systems, policies, and processes. In order to apply for grants with the major organizations (NSF, NIH), you must first [submit a request to the OSP](#), they will provide you with the most suitable type of access based on your needs (e.g. PI, research administrator, etc.).

On the [OSP website](#), click on the “Submit to OSP” button. Fill in your information and select the appropriate subject (e.g. NSF FastLane/NIH Commons Account Request).

National Science Foundation

[FastLane/Research.gov](#): OSP will provide you with a user name and temporary password. Upon first login, you will be prompted to change the temporary password—keep in mind that NSF is phasing out FastLane, and many steps are now completed in Research.gov.

Depending upon your role you will login on different tabs—PIs/Co-PIs and other authorized users will click on the Proposals tab, while research administrators will click on the research administration tab.

National Institutes of Health

[eRA Commons/ASSIST/Grants.gov](#): OSP will provide you with a user name and temporary password. Upon first login, you will be prompted to change the temporary password. Be sure to mention if you already have a commons account but need to have a different role added.

The IHSI also organizes an annual [NIH Grant Writing Series](#). It is designed to prepare junior faculty to submit a strong R01 proposal to the NIH. The series typically consists of six sessions (approximately 90 minutes each) addressing various aspects of the grant submission process. It also includes meetings with a faculty mentor with NIH proposal success.

***Remember IHSI's Research Development Managers are available to help, feel free to reach out to them to learn more about grant opportunities, faculty and clinician matches, and a host of other services. ***

Source: Content curated and edited from the [Office of the Vice Chancellor for Research](#), the [Office of Proposal Development](#), the [Interdisciplinary Health Sciences Initiative](#), the [NSF](#), the [NIH](#), and the [Campus Research Board](#) websites.

LIBRARY RESOURCES

The University of Illinois at Urbana-Champaign [Library](#) is an extremely useful resource for researchers. Locating library materials, guidance in conducting research, or finding statistical information are all examples of the types of services offered. For in-depth questions or other specialized assistance, please contact the library directly. The Social Sciences, Health, and Education Library (SHEL) Information Services Desk is available at (217) 244-1864 or schedule a [Research Consultation](#). In particular, consulting the biomedical sciences librarian is a great idea at any stage of your career/proposal development. They are available to come talk to your lab about getting the best from PubMed for example, or for one-one consultations when you have more specific questions that need to be answered. If you are unsure about what library might be best for your research you can consult the list of [libraries by college and major](#). For biomedical sciences contact Peg Burnette at (217) 300-5942 or pburn@illinois.edu. For applied health sciences contact JJ Pionke at (217) 265-0002 or pionke@illinois.edu. For behavioral sciences contact Kelsey Cheshire at (217) 265-7896 or cheshire@illinois.edu.

Scholarly Commons

The [Scholarly Commons](#) supports the traditional and emergent needs of students, faculty, and other scholars at the University of Illinois Urbana-Champaign by providing information resources, expert assistance, and technology resources that support teaching, research, and public engagement. The Scholarly Commons sustains a variety of training opportunities and learning resources related to topics such as text-encoding, digitization, optical character recognition (OCR), usability, and data analysis. There are also options for reviewing new tools, introducing resources, and discussing developments in scholarly communication on the [Commons Knowledge blog](#). Graduate assistants are on hand at the Scholarly Commons to assist investigators, and an expert can be made available for consultation. In person visits are possible and the completion of a [consultation form](#) is recommended prior to the appointment. However, drop-in appointments are also available.

Savvy Researcher Workshop

The Library's [Savvy Researcher workshop series](#) brings experts together with graduate students and faculty to explore various topics relevant to research and academic success. Usually 45-60 minutes long, the workshops provide an introduction to concepts and tools as well as helping make a contact with whom you could follow up for in-depth questions. Instructors do their best to accommodate the individual's unique research needs. To view the current schedule, visit the Savvy Researcher [calendar](#). Registration is requested by clicking on the date you want to attend. Examples include "How to Prepare for a Poster Session", "EndNote Beyond the Basics", and "A Brief Introduction to R."

Research Data Service

The [Research Data Service](#) (RDS) is a campus-wide program that provides the research community with the expertise, tools, and infrastructure necessary to manage and steward research data. The primary, immediate goal is to provide researchers with a minimal framework to allow them to comply with funding agency and journal requirements for data sharing, and the Office of Science and Technology Policy memo on public access to federally funded research. While RDS conducts regular training sessions, such as "Introduction to Data Management", or "Documentation and Organization for Data and Processes," which are an excellent tools for new students and staff, they also offer the opportunity for customized talks or workshops. Where this might be particularly useful is in the [data](#)

[management plan](#) request that is required with grant submissions. There is a really useful LibGuide that has been developed on this topic, check it out [here](#).

The Research Data Service supports the data management tool ([DMPTool](#)), which is an easy-to-use online wizard for creating ready-to-use data management plans for your specific research project and funding agency. The wizard includes help text, links to resources, and Illinois-specific suggested answers. Click “Get Started”, and in the dropdown menu select “University of Illinois at Urbana-Champaign”. Login with your university AD username and password to automatically create an account. This lets you create, save, and edit plans. Your librarian is happy to help you create a plan from scratch or review a plan that you’ve already prepared.

Institutional Repository

[IDEALS](#), the Illinois Digital Environment for Access to Learning and Scholarship, collects, disseminates, and provides persistent and reliable access to the research and scholarship of faculty, staff, and students at the University of Illinois. Faculty, staff, and graduate students can deposit their research and scholarship—unpublished and, in many cases, published—directly into IDEALS. Departments can use IDEALS to distribute their working papers, technical reports, or other research material.

Illinois Data Bank

The Illinois Data Bank ([IDB](#)) is a public access repository for publishing University of Illinois research data. Their mission is to centralize, preserve, and provide persistent and reliable access to the research data created by faculty, academic staff, and graduate students. The Illinois Data Bank is a platform for making datasets created from research projects by Illinois researchers publicly accessible by seeing that the research data is both widely discoverable and linked to associated works, such as journal articles, source code, or data deposited elsewhere.

Carle Foundation Library

The [Carle Foundation Library](#) offers a wide variety of medical and health-related information to physicians, staff, patients, and members of the community. Requests can be sent to library.request@carle.com. This may include literature searches, interlibrary loans and photocopies.

Source: Content curated and edited from the University Library website.

EXPERTS: ILLINOIS RESEARCH PROFILES

[Illinois Experts](#) enables faculty, students, and staff to discover research expertise and potential collaborators, and serves as a showcase for research and scholarly achievements at Illinois. In addition, it provides a central portal for external audiences seeking information about Illinois expertise, including potential off-campus collaborators and research sponsors. Faculty profiles are maintained through an online, searchable database, updated weekly from the [Scopus](#) abstract and citation database.

Automatically loaded publications data are representative, but not exhaustive, and researchers can enhance their profiles by adding and importing additional scholarly works and profile information. For more information, including FAQ's and videos, [see these library webpages](#).

An excellent way to enhance your profile is to upload the unique numerical IDs associated with your name. An [ORCID identifier](#) can be used for this purpose. It provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is recognized. You can also link your LinkedIn page with your IRC profile, increasing your visibility across the Urbana campus, and the wider scientific community.

Source: Content curated and edited from the [Illinois Experts](#) and the [ORCID](#) websites.

MATERIAL TRANSFER AGREEMENTS AND EXPORT CONTROL

Research often involves transferring materials or technology between institutions or companies. Agreements to protect ownership, acceptable uses, and intellectual property rights are important regardless of the direction of transfer.

Transferring Materials to the University

Any transfer of materials from another institution or company into the University of Illinois Urbana-Champaign must be accompanied by a [Material Transfer Agreements](#) (MTA). The [Office of Sponsored Programs](#) (OSP) provides guidance on the completion of the form and reviews for legal and policy issues. A joint Carle-Illinois Material Transfer Agreement Template and Data Use Agreement can be requested from OSP at osp@illinois.edu.

Transferring Materials from the University of Illinois Urbana-Champaign

Transfer of materials from the University of Illinois Urbana-Champaign to another institution or company is managed by the [Office of Technology Management](#) (OTM). OTM oversees campus [Policies and Practices on Intellectual Property](#).

Hazardous Material Shipping

[Shipping or receiving hazardous materials](#) is subject to [Department of Transportation training requirements](#) and other federal regulatory requirements.

Export Control

The University of Illinois is committed to advancing knowledge through open research in which all methodologies, data, and research results are freely shared with the public. Balanced against this commitment is a responsibility to protect the national security and economic interests of the United States, which can be achieved in part by establishing mechanisms for complying with [export controls](#).

In this context, “exports” refer both to shipments of tangible commodities and software to recipients outside the United States, as well as to disclosures of certain kinds of information to foreign nationals wherever located, including University of Illinois Urbana-Champaign faculty, staff, and students in the United States. The term “export controls” refers to the federal laws and regulations that deal with the distribution of strategically important technology and information to, and certain financial transactions with, foreign nationals in the United States and persons and entities in foreign countries.

Federal export control laws impact many activities on our campus, including research, purchasing equipment and materials, international travel, hiring, and collaborations with colleagues in other countries. Export control laws may require obtaining special approval from the government prior to engaging in these activities, and may in some cases prohibit certain activities altogether. More information, including policies, FAQs and procedures can be found on the [Office of the Vice Chancellor for Research website](#).

Source: Content curated and edited from the [Office of Sponsored Programs](#) (OSP) the [Office of Technology Management](#) (OTM) and the [Office of the Vice Chancellor for Research](#) websites.

RESEARCH ADMINISTRATION

RECRUITING HUMAN SUBJECTS

The key to successful subject recruitment relies upon advertising that reaches your target population. Think about who your target population is, where they spend time, what methods or devices they use to find out about studies, etc. There are a number of free and fee-based methods you can use to advertise your study both on and off the Illinois campus. Choosing the right methods depends on your budget, the time you have to spend recruiting, and the audience you are trying to reach.

You may want to contact your unit's communications office for help developing your advertising. Find your unit's "[Chief Communications Officer](#)" here. Please keep in mind that there are also campus branding standards to consult and general resources available from the [Office of Public Affairs](#). Prior to advertising, make sure that the information in your advertisements has been preapproved by the Institutional Review Board, and that the location where you leave any advertisement material allows fliers, etc.

University of Illinois Campus Resources

Bulletin Boards

Many of the buildings around Urbana campus have noticeboards, which are a great way to advertise your study at no cost. These are high traffic areas not only for students, but the community as well. Please contact the Office Support Personnel for each individual building for prior approval. Boards can be found at many locations including:

- Bevier Hall
- Freer Hall
- Beckman Institute
- Coordinated Science Lab
- ECE Building
- CRCE / ARC
- McKinley Health Center (consult with Mckinley administration)
- University of Illinois Cultural Centers: Native American House, African American Cultural Center, Asian American Cultural Center, La Casa Cultural Latina, Women's Resources Center
- Illini Union (to post inside of Illini Union, you need to visit the Guest Services Desk)

Digital signage

Many buildings on campus now offer digital signage in their public areas. The Office of Public Affairs maintains a [list of available digital signage](#) locations, the dimensions for the artwork, and if there is a fee associated with that location.

Class Announcements

Some researchers have found that emailing professors who teach large lectures is useful, asking if they would be willing to let them speak to the class. It is best to start with professors that you already know. Information about [course schedules and instructors](#) is available online.

Community

Posting Boards

All of the following spaces have dedicated community posting boards. Please contact for prior approval.

- Park Districts Recreation Centers: [Urbana](#), [Champaign](#)
- Educational Hubs: [Independent Media Center](#) (IMC), [Urbana Adult Education](#) (UAE)
- [Parkland Community College](#)
- [Health Department of Champaign Urbana](#) (WIC encompassing)
- Fitness Studios and Gyms (e.g. [Planet Fitness](#), [Refinery](#), [Charter Fitness](#))
- [Lincoln Square Mall](#) (posting board in center of Mall Hall)
- [Champaign County Housing Authority](#) (posting boards upstairs and downstairs, housing complexes and Senior Citizens Buildings)
- Libraries: [Champaign Public Library](#), [Douglas Library](#), [Urbana Free Library](#)
- [Champaign Unemployment Office](#)
- [City buildings: Champaign City Building](#), [Urbana City Building](#)
- Book stores
- Restaurants and grocery stores (i.e. Panera, Common Ground, Einstein Brothers, County Market, Harvest Market, Meijer)
- Convenience stores (e.g., Walgreens, CVS)

Organizations

Many local organizations in the community will allow you to advertise your study through fliers, email blasts, and even presenting your research in a talk. Examples of these organizations include the Champaign Rotary, Urbana Rotary, Lions, Osher Lifelong Learning Institute, churches, and schools. Please keep in mind that there are [guidelines for recruiting in Unit 4 schools](#).

[Chambana Science Café](#), sponsored by the Beckman Institute and the Carl R. Woese Institute for Genomic Biology, is a local monthly series dedicated to bringing scientists to the public to talk about their work. This could be an option to help get the word out about your program.

Media Outlets

Examples of media outlets for both paid and free advertising are listed below. You should consider working with your unit's communication office to take advantage of their media buying expertise.

Bus Advertisements

Bus ads ranging from a small interior poster to a full bus wrap can be created on one or more buses. Ads can also be displayed on the map and schedules booklets and at major bus stops. There is also the option to have an audio ad playing on the bus. More information on MTD advertising is [here](#).

Newspapers

Daily Illini

The Daily Illini student newspaper has options for both [display and classified advertisements](#). Display ads are based on the size of the ad and are located anywhere in the issue. Classifieds are paid per character or word. What you are advertising will dictate the type of ad that is best for your use.

The News-Gazette

The News-Gazette also has options for both [display and classified advertisements](#).

Radio

There are a number of radio stations in the community that offer paid advertising or underwriting (e.g. WILL, WDWS, Lite Rock 97.5, 93.5, and Sunny 95.3). Consider asking for audience/market statistics from each radio outlet before purchasing ad space/air time.

Television

Local television stations also can be used for advertising research. News broadcasts often highlight projects and can give some basic recruitment information in a news story. A public service announcement can be sent directly to a news reporter or the station website often has links for submitting news story suggestions. Also, locally produced programs such as [ciLiving](#) on WCIA are often interested in research conducted on campus.

Keep in mind that the Institutional Review Board and the funding body may have restrictions involving radio or TV advertising. News outlets may make unwarranted suppositions about the effects or findings of research to flesh out the story, so just be sure to have approval from the IRB and the funding body prior to having any contact with reporters or the news.

Online

Registries

Depending upon the population you want to target, there may already be registries developed where you can try to recruit participants. For example, the [Army of Women](#) is an initiative that partners women and men with researchers to enable research into the causes of breast cancer. There are also initiatives to create registries of both clinical and healthy populations on the Urbana campus and at Carle Hospital. Contact your Interdisciplinary Health Sciences Initiative [research development manager](#) to discuss these programs.

Keep in mind—if you plan on starting your own registry based on data that you have collected, or plan on collecting, you must first obtain IRB approval.

Psychology Department's Paid Subject Pool

Faculty, post-docs, graduate students, and honors undergraduates in psychology are eligible to use the Department of Psychology's [Paid Subject Pool](#). When you first launch your study in the Psychology Paid Subject Pool it will be allocated 1,000 participant hours as a maximum. If you reach that limit, contact the subject pool coordinator, who will add more hours to your study. Keep in mind that after your study is approved by the IRB, it must go through a second review by the Human Subjects Committee before it may be run using the Paid Subject Pool.

Eweek

Eweek is a weekly email newsletter with brief summaries of campus announcements of general interest to faculty and staff members of the University of Illinois. Any faculty or staff member at Illinois can submit a post to Eweek. Items must be submitted by noon on Friday to appear in the Sunday Eweek.

Virtual Job Board

The virtual job board is intended to assist students in finding part-time employment and can be used to advertise paid research participation opportunities.

Unit Social Media Accounts

Many units have social media accounts such as Facebook and Twitter. These outlets provide another electronic method to get the word out about your study. Contact your unit's communications department for more information.

Chambanamoms

[Chambanamoms](#) is a family-focused resource targeting parents in the Champaign-Urbana region. There are many advertising options for every size budget imaginable, from display advertising, to sponsored content, from short-term opportunities, to long-term relationships.

Craigslist

The [local Craigslist](#) website has a volunteer section where you can advertise.

CUVolunteer

[CUVolunteer](#) is a group of community members who are interested in making volunteering easier in our community. It is a partnership between the United Way of Champaign County, the Office of Public Engagement, the Office for Math, Science, and Technology Education, and the Office of Volunteer Programs.

Source: Content curated and edited from a range of websites, see links for more information.

PROFESSIONAL DEVELOPMENT

University of Illinois Training Opportunities

Whether you are new to campus, or looking for a refresher course, there are several opportunities to engage in a broad range of training courses on campus.

Training@illinois

The [Training@Illinois group](#) offers details of programs and units that offer training opportunities across campus (some are outlined below).

University of Illinois Library

The [library](#) also offers details about [staff development and training opportunities](#) across campus, including in-house training on topics such as online reference tools, reference interview, and library database searching.

Training, Performance Development, and Communications in OBSF

The Training, Performance Development, and Communications unit in the [Office of Business and Financial Services](#) (OBSF) provides information on courses, workshops, materials, and other resources offered to campus units to meet their needs for training, knowledge and understanding of the OBFS systems, policies, and processes. Subscribe to the [OBFS News Service](#) for the latest offerings.

Technology Services

Technology Services offers ongoing training opportunities including [FAST3](#) training opportunities, and [Sensitive Data Orientations](#).

lynda.com Online Training Library®

The University of Illinois has contracted with [lynda.com](#) to provide employees with access to over 1,200 online lynda.com courses. Access is available to all students, faculty and staff. These video-based tutorials are taught by industry experts and available 24/7 for convenient, self-paced learning on leading software topics including Adobe products, Apple products, Microsoft products, Drupal, video editing, audio editing, operating systems and much more. Access to lynda.com is available [here](#).

SPaRC'Ed

[SPaRC'Ed](#) is the sponsored programs and research administration certification series for the Urbana campus. SPaRC'Ed is sponsored by the Sponsored Programs and Research Compliance (SPaRC) working group, the Office of Vice Chancellor for Research, and the Office of the Assistant Vice President for Business & Finance. SPaRC'Ed provides research administrators of all experience levels with the knowledge and skills necessary to effectively administer sponsored programs and research activities across the full project lifecycle. The application period is open from mid-May to mid-June each year. The application form is accessible on the SPaRC website during the acceptance period.

University of Illinois Undergraduate/Graduate Programs

Academic employees may be eligible for a tuition and service fee waiver if they hold an appointment of 25 percent or more of full-time service for not less than three-fourths of a term. Academic employees can receive a tuition waiver and fee exemption from any of the campuses (Urbana, UIC, or UIS). There is no set limit on the number of credit units that may be taken by academic employees. The value of graduate-level educational benefits exceeding \$5,250 in a calendar year is subject to employment taxes and must be reported as taxable wages on Form W-2. The value of undergraduate level tuition waivers for employees is not taxable.

Source: Content curated and edited from the [Human Resources office](#), the [University Library](#), the [Office of Business and Financial Services](#), [Technology Services](#), and the [SPaRC'Ed websites](#).

SUBJECT PAYMENTS

The method that you use to pay participants for taking part in your University of Illinois study will vary depending on the nature of the study and the nationality of the participant. If in doubt, it is a good idea to consult the [program advances](#) page on the Office of Business and Financial Services website.

Your first task should be to contact your unit's business office to discuss the steps involved in setting up any necessary accounts required to facilitate subject payments. It is important to consult both your [Institutional Review Board](#) (IRB) and your home department before describing the payment method in the protocol form and the informed consent forms. The method needs to be included in your protocol and approved by the study IRB. Keep in mind that the method of payment available to you may vary based on the resources available in your home department/school and the payment amount.

Open a Program Advance to Pay Human Subjects in Cash or Gift Cards

Cash and all forms of gift cards used to pay human subjects must be obtained or purchased using a [program advance](#) issued in the name of the faculty or staff member responsible for the program. For tax reasons, cash or gift card payments to a human subject in research studies may not exceed these amounts in a calendar year:

- Non-confidential studies: \$100
- Confidential studies: \$600

In order to get a program advance you will need to provide information about the study. For example, is the study confidential, how many participants will be paid, the total amount needed per subject, and the name of study. An employee may have only one outstanding program advance at any given time. The payee is personally responsible for the safe keeping of the cash or gift cards and repayment of the advance. Lost or stolen advances (even if in the form of gift cards) cannot be replaced using any type of University fund.

One-Time Advance

Program advances for studies completed within 30 days must be closed promptly upon completion of the study. Program advances not closed within 60 days of the end of the study may be reported as taxable income to the employee in accordance with IRS regulations. Advances not closed within 90 days may be deducted from the employee's wages and the employee risks not being allowed future advances.

Revolving Advance

Program advances for studies lasting longer than 30 days may remain open for six months. However, expense reports must be submitted monthly to replenish or partially close the advance. Substantiation for payments submitted more than 60 days after incurrence may be reported as taxable income to the employee. Advances not replenished or closed within 90 days may be deducted from the employee's wages and the employee may not receive future advances.

Setting up a Cash Advance

There are a number of steps involved in opening a program advance to pay human subjects in cash or gift cards (keep in mind that you may need to sign in to access some of this information):

1. Plan ahead. Processing a request can take up to five days. Estimate how much you will need for the first 60 days of the study. If additional funds are needed after that, consult [Replenish a Program Advance](#) to Pay Human Subjects. This can take 48 to 72 hours.
2. For tax purposes ensure that recipients are U.S. citizens, permanent residents, or resident aliens. If they are non-resident aliens, consult [Award, Prize, and Human Subject Payments](#) and keep in mind these take longer to process.
3. Log in to [TEM](#) (Travel and Expense Management System). In the 'Create New' area, select the Expense Report icon. If you need help identifying the icon, consult the job aid for [System Navigation](#).
4. In the 'Document Header' screen, begin your Report Title with "ADV" so University Payables (UPAY) can expedite processing. Select 'Advances' from the drop-down list in the 'Purpose' field.
5. In the 'Document Header' screen, select where you want to pick up the money from the drop-down list in the 'Special Handling' field. Enter the expense report number (for example, ER00001234) in the 'Vendor Invoice' field.
6. Proceed through the screens. For step-by-step instructions, consult the job aid [Open and Close a Program Advance](#).
7. UPAY processes the payment request.
8. University Student Financial Services and Cashier Operations (USFSCO) prints a check payable to the owner of the expense report.
9. USFSCO contacts the payee when the check is ready. To pick up the check, go in person to Cashier Operations and present your University i-card. They will then cash the check so you can pay the human subjects or purchase gift cards.

Request Checks Made Payable to Human Subjects

Before You Begin

Payments to human subject must be issued in the form of a check when:

- Total payments to a human subject are \$100 or more for the calendar year

OR

- Payments must be mailed

This procedure creates a separate TEM Expense Report for each human subject. If you need more than 50 checks, contact University Payables (UPAY) on how to submit the Multiple Payee form.

Begin

To [request checks](#) made payable to human subjects:

1. Confirm the recipient is a U.S. citizen, permanent resident, or resident alien. If they are not, consult [Award, Prize, and Human Subject Payments](#).
2. Determine whether the recipient has a Banner vendor number. For step-by-step instructions, consult the [Banner Vendor ID and Address Query job aid](#).

If the recipient does not have a Banner vendor number and the cumulative amount paid to them for the calendar year is:

- **Less than \$100**, proceed to Step #3.
- **\$100 or more**, set up the recipient as a vendor as outlined in Set Up a New Vendor ID in Banner. Proceed to Step #3.

If the recipient has a Banner vendor number, proceed to Step #3.

3. Log in to TEM. In the Create New area, select the Expense Report icon. Consult the job aid for System Navigation if you need help identifying the icon. Create a separate Expense Report for each human subject. If you need more than 50 checks, contact UPAY for instructions on how to submit the Multiple Payee form.
4. In the Document Header screen, if the recipient will receive:
 - **Less than \$100** in the calendar year, select “Temp Vendor Payment” from the drop-down list in the Purpose field.
 - **\$100 or more** in the calendar year, select “Misc Payment-Vendors, Non-Employees, and Students” from the drop-down list in the Purpose field.
5. Proceed through the screens. Select “141200-human subjects” from the drop-down list in the Expense Type field. Consult the [Miscellaneous or One-Time Vendor Payments](#) job aid for step-by-step instructions.
6. UPAY reviews the request and processes the payment. University Student Financial Services and Cashier Operations (USFSCO) mails the check to the recipient.

Payments to Foreign Nationals

The OBFS provides guidelines for [payments to foreign nationals](#). The Internal Revenue Service (IRS) identifies foreign persons in one of two categories for tax purposes, [Nonresident Aliens vs. Resident Aliens](#). Because of tax and immigration laws, making payments to foreign national employees, independent contractors, students, and visitors can be a complicated process.

Before you consider any action that would result in a payment to a foreign national, please review the [Foreign Nationals Payment Eligibility Grid](#), which identifies the most common types of payments and links to the documents required for those payments. This grid identifies common payment types, whether they are possible or not, and links to information on the documents required to process the payment. If your situation is not represented on this grid, please [e-mail the University Payroll Service Center](#) for assistance.

It is good practice to inform foreign nationals that they may be taxed on payments received for taking part in your study—please consult the grid and inform them of what is involved before letting them take part. In some circumstances foreign nationals cannot be paid for human subject research. For example, it is unlikely that a foreign national can take part in a confidential study—the researcher will need to verify immigration and tax status to ensure that they are eligible to receive a payment (cash or gift card, as either may need to be reported as income), giving up the confidential nature of the study.

For more information, frequently asked questions, and details about who to contact to discuss these procedures in more detail see the [OBFS website](#).

Source: Content curated and edited from the Office of Business and Financial Services, and the Office for the Protection of Research Subjects websites.

HIRING

Your research operation may require hiring people and setting up new appointments. Your unit human resources office will be a great help in setting up new appointments within your lab. There are a number of [different positions](#) that you are likely to advertise within the lab setting and information about how to hire an employee can be found on the campus [Human Resources page](#). Faculty or staff can designate a proxy, e.g. the research coordinator to turn in all documents, review/approve appointments, and transfer an appointment to [HireTouch](#) for departmental/unit approval. Links to all academic human resources policies are [available online](#).

Academic Hourly

Academic Hourly positions are temporary, non-Civil Service jobs. These positions require a minimum of a bachelor degree, along with professional qualifications and expertise. They are appointed on a temporary or intermittent basis and are paid bi-weekly for the hours worked. If more than 40 hours are worked in any given calendar week, the employee is due overtime pay. Academic Hourly employees should not be a registered student (graduate or undergraduate) at the University of Illinois. Academic Hourly employees should be performing technical work requiring specialized knowledge; they should not be doing clerical work as part of their assigned duties.

For information on student payment rates see this [page](#) on the Office of Student Financial Aid website. You may need to discuss payment for other hourly employees with your local HR office.

Unpaid

An unpaid position is an appointment that indicates a relationship with the University but that has no service requirement. In most cases, these appointments are provided to people outside of the University to reflect an affiliation with the University.

Graduate Assistants

Graduate Assistants are student appointments. There are four types of graduate assistantships:

- *Research Assistant (RA)*: The duties of a Graduate Research Assistant primarily involve applying and mastering research concepts, practices, or methods of scholarship. Examples of typical responsibilities include the following: conducting experiments, organizing or analyzing data; presenting findings in a publication or dissertation, collaborating with faculty in preparing publications, overseeing the work of other research assistants.
- *Pre-Professional Graduate Assistant*: Pre-Professional Graduate Assistants are appointed to non-TA/non-RA assistantship positions, in which they primarily gain experience, practice, or guidance that is significantly connected to their fields of study and career preparation.
- *Teaching Assistant*: The duties of a Graduate Teaching Assistant are primarily in support of instruction and include responsibilities such as the following: teaching classes; grading student assignments, leading lab or discussion groups in a course setting, developing academic instructional materials, proctoring exams, overseeing/coordinating the work of other teaching assistants, holding office hours, and tutoring students. Teaching assistant positions are covered by a [collective bargaining agreement](#) with the Graduate Employee Organization (GEO).

- *Graduate Assistant (administrative)*: The duties of a Graduate Assistant are primarily in support of administrative functions and include such general functions and typical duties as providing technical/support services, advising students, etc. Graduate Assistants (administrative) are covered by a [collective bargaining agreement](#) with the Graduate Employees Organization (GEO)
- For information about recruiting Illinois undergraduates to work as paid or volunteer research assistants see the [Office of Undergraduate Research](#).

Foreign Nationals

The International Student and Scholar Services provides information about [hiring guidelines](#) for international employees. Here they detail information that will allow you to determine employment eligibility for potential international hires. The Office of Business and Financial Services also has a lot of detail about [making payments to foreign nationals](#). As a result of tax and immigration laws, making payments to foreign national employees, independent contractors, students, and visitors can be a complicated process.

Extra Help

[Extra Help](#) employees provide clerical, accounting, and information technology candidates to campus units for temporary assignments. Extra Help Services manages all payroll, records, and employment processing for Extra Help employees in accordance with State Universities Civil Service System Statute and Rules. In order to request some temporary help in your lab fill out the [online request form](#). You will need to provide job details as well as a CFOPAL (account to be charged) for payment.

When an Employee Leaves

When an employee notifies you that he or she is leaving the University, the home unit should have the exiting employee complete one of the following: [Academic Exit Checklist](#) or the [Grad and Academic Hourly Exit Checklist](#). Once the employee has read and completed the checklist, it should be returned to the home unit. The unit needs to make a copy of the completed exit checklist for the employee as well as to place the original checklist in the employee's departmental personnel file. The exit checklist should NOT be forwarded to Academic Human Resources and should NOT be attached to the [HR Front End Separation transaction](#). For more information see the [Employee Exit Procedures](#).

Source: Content curated and edited from the Human Resources, and the International Student and Scholar Services websites.

INFORMATION TECHNOLOGY

There are a range of Information Technology (IT) services available across the Illinois campus. You should consider consulting your unit to see if they can assist with your needs. For larger projects, general training, etc., the campus wide Technology Services might suit your needs better.

Department/Unit Information Technology Offices

Departmental IT offices can often advise on your lab or project's computing requirements, data storage, printing, and file/data storage.

Unique Email Address

An email address unique to your lab/study can be set up by your home department IT office—this is a great way to manage your lab email and will include Illinois-specific naming, e.g. lab@illinois.edu. The IT department can set up a lab email address “inbox” attached to multiple NetIDs/Outlook accounts. Connecting a single email address with multiple recipients requires coordination in replying, to avoid sending multiple replies.

Technology Services

If your study (or lab) and its participants would benefit from its own website, Technology Services offers a build-your-own website tool at www.publish.illinois.edu. It allows you to create a basic website quickly via a Wordpress platform. Off-site support is provided via email for this tool. Content management and administrative roles can be assigned to multiple users. There may also be a person within your unit's communication office that can assist you with creating and updating a lab web page. Find your unit's “Chief Communications Officer” [here](#).

You can access more information on other IT services for buildings, departments, and researchers [online](#).

Webstore

There are a range of software options that are available to staff and students at Illinois. Many are free to University employees, though fee-based purchases can be made using a CFOP. The [WebStore](#) has details of both Mac and Windows products that are available to download, e.g. Adobe, EndNote, Matlab, Microsoft Office, Skype for Business, and SPSS.

Personal vs. Unit Purchase

Personal Purchase software is for personally-owned machines, not University of Illinois at Urbana-Champaign-owned machines. Training offers listed in the Personal Purchase store are for individuals registering for courses that will not be paid for by University funds. All purchases in the Personal Purchase store require a valid credit card for items that are not free.

Unit Purchase software is for machines owned by the University of Illinois at Urbana-Champaign. Training offers listed in the Unit Purchase store are for individuals registering for courses that will be paid for using campus funds. All purchases in the Unit Purchase store require a Banner Account Number for items that are not free. *It's important to note that some Unit Purchase licenses do allow a second installation on a personal machine.*

Training

There are also several [training events](#) organized by the webstore that may prove useful.

Webtools

Web Services offers a [variety of tools](#) to help with online and electronic communications, including calendars of events, blogs, surveys, forms, and massmail. [Training sessions](#) for these are offered as monthly webinars and as static video tutorials. This is a great way to send emails to groups of participants, set up surveys that people can complete online, etc.

Data Management

The [University Library](#) offers a range of options for managing your data efficiently, which is essential to both the short and long-term usability of your data for yourself as well as other researchers. This is something that you should implement from the START of your project. The library provides resources to help you understand how to manage your data and develop a plan for funding agencies such as the National Science Foundation.

If you have questions or need help, please send an email to researchdata@library.illinois.edu. Or, call (217) 244-1331 and someone will get in touch with you as quickly as possible. *Note that these resources are generally related to digital data rather than physical data such as specimens.*

Source: Content curated and edited from the Technology Services, WebStore, Office of Public Affairs, and University Library websites.

PROMOTING YOUR RESEARCH

Sharing news about your research is very important and there are a number of units you can work with to accomplish this.

U of I News Bureau

The [U of I News Bureau](#) generates and coordinates national news coverage of the Urbana-Champaign campus. News Bureau writers cover [specific campus beats](#) and also provide advice for interacting with the media. The research stories they write are typically connected to the release of published findings.

Unit Communications Offices

Many departments and colleges have communications professionals that are there to help you share news and research results on websites and social media. Find your unit's chief communications officer [here](#).

Interdisciplinary Health Sciences Initiative (IHSI)

[IHSI](#) shares news and updates on health sciences research at Illinois. IHSI posts news on research, awards, honors, and achievements online, in their newsletters, and on social media.

Twitter: [@IllinoisIHSI](#).

Office of the Vice Chancellor for Research (OVCR)

The OVCR is also interested in hearing about your research accomplishments. The OVCR shares research news on its website, reports, emails, newsletters, and on social media. To share an item with the OVCR, email ovcr@illinois.edu.

Twitter: [@UofIResearch](#)

Office of Technology Management

The [Office of Technology Management](#) can help you understand the intellectual property issues in research activities and your role in commercializing university innovation.

Twitter: [@LInnovations](#)

TIPS FOR SUCCESS FROM IHSI

IHSI GUIDELINES FOR DEVELOPING CLINICAL PARTNERSHIPS

IHSI is here to help you develop successful clinical partnerships in your health sciences research. Currently we are working with the [Mayo Clinic](#), [OSF Saint Francis Medical Center](#), [Jump Trading Simulation and Education Center](#), [Massachusetts General Hospital](#), [University of Chicago College of Medicine](#), and [Carle Health System](#). While the guidelines listed below may vary somewhat between specialty areas and clinical partners, many elements will be consistent across the board:

- Express an interest in a study/trial and develop a concept
- Contact your IHSI research development manager:
 - Cancer and community projects, contact [Margaret Browne Huntt](#)
 - Clinical and Translational Neuroscience, contact [Gillian Cooke](#)
 - Precision Medicine, contact [Maggie Miller](#)
- Get connected with a clinical partner
- Study protocols and plans are developed
- The study goes through a feasibility process
- If necessary a funding application is submitted
- Study is active and data are collected
- Study is completed and data are analyzed and disseminated

ESSENTIAL KNOW HOWS

There are a number of essential know hows that IHSI has identified to help faculty and research coordinators be successful. We hope you find these tips helpful in your health sciences research.

Faculty

- Principal investigators need to update their degree/residency data **before** submitting an R01 grant application to the National Institutes of Health (NIH).
- My NCBI (National Center for Biotechnology Information) citations from [PubMed](#) automatically appear in the List of Publications screen for NIH submissions (after the user links their My NCBI & Commons accounts). If you don't already have a My NCBI account you should create one!
 - Log into My [NCBI](#)
 - Click on your login name in the top right.
 - Then click on the 'Change' button for 'Linked Accounts'.
 - From the list of 'Login Account Options', scroll down and choose 'NIH & eRA Commons' and then log into your eRA Commons account.
- If you visit PubMed via the library there is a link to full text articles which saves time in proposal prep!
- All Illinois investigators, students, and research staff conducting research with human subjects must complete training and education requirements every three years. All investigators, students, and research staff conducting research with human subjects at Carle must complete training and education requirements every two years.
- Remember that research involving special subject groups will require additional ethics training and documentation in the application.
- It is important to organize your data properly from the beginning of the study as it must be archived for at least five years after the publication of the last paper.
- Be sure to contact the [Office of Technology Management](#) as the first step in a process that could potentially lead to commercialization of your technology.

Research Coordinators

- Order testing materials/equipment early—depending on the source, acquisition can take time.
- Be sure to identify your unit's purchasing contact—they will place any orders that you need to make. The cost and type of materials/services may place more restrictions on this process. Depending upon the cost, the items may need to have a university tag and be inventoried. Keep in mind that there are bid limits (cost depends upon category) for individual procurements of supplies or services other than professional or artistic services, and procurement of construction.
- Create a protocol before you run any subjects, this should translate the tests and experiments specified by the PI into step-by-step instructions for administering them, including word-for-word scripts. Then get some volunteers and run some practice sessions, this should iron out any problems.
- Remember working with subjects requires a lot of time spent juggling correspondence and scheduling, so use your people skills and be patient with them—at the end of the day we have no results without our subjects!
- People who will be working at Carle must gather their immunization records. Carle has a list of required immunizations that are needed before you engage in active research (TB Skin Test, Varicella, Measles, Mumps, Rubella, Influenza) and recommended (Hepatitis B, Tdap). A similar document is available online for [volunteers](#).



**INTERDISCIPLINARY
HEALTH SCIENCES
INITIATIVE AT ILLINOIS**

FOR MORE INFORMATION CONTACT IHSI:

healthinitiative@illinois.edu

healthinitiative.illinois.edu

(217) 244-8480