Step 1 – You must complete all these tasks prior to beginning a project at Wisconsin Advocate Aurora Health.

☐ During your initial meeting with your academic project chair:
  • focus the clinical question
  • discuss project fit for meeting the program expectations
  • identify appropriate outcome measures

☐ Identify possible Wisconsin Advocate Aurora Health sites to conduct your project

☐ Identify a Wisconsin Advocate Aurora Health preceptor (refer to your academic project requirements to determine who is qualified to serve in that role prior to asking someone to do it)

☐ Confirm the site’s need for your project with your preceptor

☐ Validate support (resources including preceptor time to work with you) for the project at the site

☐ Meet with your preceptor and discuss the expectations for a project preceptor. Provide a written document that clearly lists the expectations.

☐ Confirm that your faculty chair and preceptor discussed project intent, timeline, outcomes and chair vs preceptor responsibilities

☐ Provide the preceptor with a copy of the syllabus and/or project toolkit to review

☐ College or university preceptor agreement is completed (if the school is requiring one)

Step 2 – Begin “onboarding” as a student to your Wisconsin Advocate Aurora Health location through Nursing Clinical Affiliations (this is not the same as onboarding with your academic institution).

☐ Faculty chair or designee submits an electronic placement request through the Aurora WI Nursing Clinical Affiliations student website.

☐ If a contract needs to be signed between Advocate Aurora Health and your college or university, it can take as long as 3-months. Please make sure that your school has a contract already in place or
has started the process. **A placement will not be approved without a signed contract.** Only the school placement coordinator may request a contract by emailing: WINursingClinicalAffiliations@ah.org

☐ College or university sends a copy of the signed preceptor agreement, if one was required.

☐ **Once your placement has been approved by Advocate Aurora Health student affiliations**, you will begin onboarding with the clinical site. This must be done **EVERY SEMESTER** until your project is completed. Onboarding instructions for all Wisconsin Advocate Aurora sites are available on the Aurora WI Nursing Clinical Affiliations student website.

**NOTE:** If you are in consecutive semesters, the school must still send in your placement request each 6 months. However, we can use the paperwork and orientation from the beginning of the program. The Epic access can be extended easily with the new placement request.

**Step 3 - You must complete all these tasks prior to beginning any projects at Wisconsin Advocate Aurora Health**

☐ Complete your project design – **Specific considerations for use of data in a student project.**

  • Data is defined as metrics employed by Advocate Aurora Health (AAH) for purposes of quality improvement, evaluating satisfaction/engagement levels, and regulatory agency-imposed reporting requirements.
  
  • Data may also be defined as personal health information (PHI) belonging to individuals utilizing Advocate Aurora Health services.
  
  • Use of identifiable PHI in student projects is restricted according to the following:
    
    o Identifiable PHI is not accessible to students for projects done for academic degree requirements at AAH.
    
    o Identifiable PHI is not accessible to AAH employees who are in a student role and looking to use identifiable PHI in a project for an academic degree when the project is done at AAH.
    
    o PHI may only be used by a student when the PHI has been de-identified by an AAH employee with approved access to electronic health records or when the PHI is provided in an aggregated report form with no identifiers.
    
  
  • Access to or use of identifiable PHI in student projects done for purposes of an academic degree when completed at AAH may only be done when an additional data user agreement is put in place. Data user agreements are enacted between the academic site and the clinical site and require time for legal review and approval.
☐ Review and revise the project design with input from your chair and your preceptor

☐ Complete a Human Subjects Research Determination Form. The current form is available on the Research Subject Protection Program website. The form on the student information websites is revised periodically so be sure to only use forms from the Research Subject Protection Program website listed here: https://www.aurorahealthcare.org/rspp-irb

☐ Have both your chair and your preceptor review the completed form. DO NOT submit anything to the IRB at this point. Here are some tips for completing the form:

You are asked to answer 6 questions in Section II – Study Information. While the form itself is brief, your responses to the questions must fully describe all aspects of your project. One sentence responses or vague responses are not acceptable.

• **Question 1:** Will an Aurora caregiver/employee be surveyed as a participant in the conduct of the project?
  o If you are conducting any type of employee survey or questionnaire as part of your project, choose YES from the drop-down menu.
  o You will need to send a clean copy of your survey or questionnaire along with the completed Human Subject Research Determination Form to research.preauthorization@aah.org
  o If you are NOT using an employee survey or questionnaire in your project, you will submit the completed Human Subject Research Determination form to irb.office@aah.org These instructions are also given to you at the top of the Human Subjects Research Determination form.

• **Question 2:** Is the project designed to contribute to generalizable knowledge?
  o Results from evidence-based practice projects and performance improvement projects are not considered “generalizable knowledge”.
  o Even though the form uses the term “study” in quite a few places, your project is not a study. Always refer to it as a “project”. Choose NO from the drop-down menu.

• **Question 3:** Describe the reasons for conducting the proposed project.
  o The reasons for conducting the proposed project are those things you have discussed and written about when doing your proposal for class.
  o Your background and significance that you identified from literature combined with a demonstrated need from the identified project site should be included in this response.
  o Include a summary statement that captures the benefits of the project for the patients, the site, or the employees

• **Question 4:** Provide a brief synopsis of the project, including objective(s)
  o Your objective(s) must be realistic, clearly written, and measurable.
  o Each objective should measure only one outcome
  o How will you recruit your participants?
  o If there is an intervention, what will that entail? Be specific. What is expected of the participants?
Is your preceptor de-identifying any data for you? Are you using aggregate data from a report? How will you get that report?
Is there any kind of follow-up contact with the participants?

**Question 5:** Describe the proposed methods and procedures.
- Begin with how the participants will be informed that their participation is voluntary, and they are free to leave the project at any time.
- Describe each step of your project.
- How long will it take?
- Describe in detail what type of data you are collecting
- Describe how you are obtaining your de-identified data (Students will NOT have access to identified patient data. If you are an Advocate Aurora Employee, you must remember you are not functioning as an employee when you are completing academic projects. You DO NOT have access to patient records or data in your student role. – You must make arrangements with your preceptor to de-identify data or conduct your project using only aggregated data from reports.) Describe your data in detail. Describe the way it will be deidentified before you see it in detail.

**Question 6:** Describe subject population/type of data to be studied
- Do your participants have a particular condition or, if they are employees, work on a particular unit?
- What is the age range for your participants? If employees, is the amount of experience or education why you want them in your project?
- State any specific criteria that you will use to decide if a participant is selected or excluded from your project.
- Go into detail about exactly how the data will be de-identified. The IRB is making sure that your participants cannot be linked to their data.
- This question sometimes repeats some information from the previous response but that is acceptable.
- How will data be stored during the project?
- What will happen to your data when the project ends?
- How will you disseminate your results?

- Obtain an administrative support letter from the Chief Nursing Officer (not a Director, Manager, Supervisor, or Physician) of the facility in which you will conduct the project (See policy titled: “APPROVAL AND CONDUCT OF NURSING RESEARCH” # 1021, and “CHIEF NURSING OFFICER CNO LETTER OF SUPPORT FOR RESEARCH TEMPLATE: APPENDIX A” #1021A)
- You will be notified when all preliminary reviews have been completed and you are cleared to submit your form and letter to the IRB

**Step 4 – Conducting the Project**

- Adhere to the project protocol you identified in the approved Human Subjects Research Determination Form
☐ Touch base frequently with your preceptor and academic project chair to update them on the progress of your project.
  
  ☐ Have regularly scheduled conversations with your preceptor and academic project chair
  ☐ Schedule mid-project preceptor/faculty follow-up discussion of your project

☐ Report any project issues to your preceptor and your chair immediately

**Step 5 – Disseminating Project Results**

☐ Any data and materials utilized in your project that you plan to disseminate must be reviewed by your preceptor and chair prior to public release

☐ Plan an internal Advocate Aurora presentation. Advocate Aurora Health expects students to present completed projects to appropriate groups within the organization. Your preceptor can help you find internal presentation venues.