Advocate Health (Midwest Region) RN to BSN, MSN, and DNP Scholarly Project Checklist

The purpose of this document/checklist is to provide important information and steps allowing you to progress through the process. Read this entire document before starting your project.

**Step 1 – You must complete all the following tasks before beginning your project.**

- During meetings with your academic project chair, it is an expectation that you:
  - focus your clinical question based on the problem identified and the need for the project
  - discuss project fit for meeting program expectations
  - identify appropriate outcome measures

- Identify possible Advocate Health Midwest Region (AHMR) sites and a qualified preceptor to conduct your project (refer to your academic project requirements to determine who is qualified to serve in the role of preceptor before asking someone to serve)

- Confirm with your preceptor the site’s need for your project and that it is consistent with the site and/or organization’s priority.

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

- Meet with your preceptor and discuss the expectations (timeline, resources, costs, sustainability) for a project preceptor. Provide a written document (copy of the syllabus and/or project toolkit to review) that lists preceptor expectations.

- Confirm that your faculty chair and preceptor discussed project intent, timeline, outcomes, and chair and preceptor responsibilities.

- AHMR legal department does not allow preceptors to sign an additional preceptor agreement with the college/university.

- If a contract needs to be signed between AHMR 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. **Placement will not be approved without a signed contract.** Only the school placement coordinator may request a contract by emailing:
  - Illinois - ASC-ClinicalAffiliations@aah.org or Wisconsin - WINursingClinicalAffiliations@aah.org

**Step 2 - You must complete all these tasks before beginning any projects.**

Complete your project plan with input from your chair and preceptor.

- **Specific considerations for the use of data in a student project.**
  - Data is defined as metrics employed by AHMR 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 AHMR services.
  - Some data is proprietary (NDNQI benchmarks, etc.) and is not eligible for inclusion.
  - Use of identifiable PHI in student projects is restricted according to the following:
    - Identifiable PHI is not accessible to students for projects done for academic degree
Completing the Human Subjects Research (HSR) Determination and Project Summary with Advocate Health IRB

□ Using your project plan, draft a Human Subjects Research (HSR) Determination Request Form confirming that your project is NOT research. The HSR form must be completed in its entirety, be thorough, complete, and free of grammatical errors. Forms that do not include specific details on how you will achieve your goal will be returned for more information, causing significant delays in the application. The form must be typed and e-signed. The turnaround time to receive the determination letter from IRBNet is several weeks.

• The HSR determination process is completed by using IRBNet and is located at https://www.IRBNet.org/release/home.htm
• To use IRBNet.org you must set up an account by completing the new user registration. The new account should be associated with the student email account. Employees should not use their AHMR email address to set up the IRBNet account. Once you have created a new student account, add Advocate Aurora Health, Downers Grove, IL, to your existing affiliations. To do this go to your user profile in IRBNet to add the additional affiliation.

• When completing the HSR determination form, avoid all terms on the application that indicate research study, randomized control, hypothesis, investigation, generalizable knowledge, subjects, etc.

• Use the terms that clearly identify this project as non-research. Use terms such as single site, EBP change project or QI project, educational focus, etc.

• You must also complete the project summary form located in IRBNet (Review the AHMR HSR/IRB and Project Summary Submission Requirements instructions located on the website).

□ Your chair and preceptor must review and approve the completed HSR determination form before submission. Below are detailed instructions for answering the questions on the HSR determination form.

You are asked to answer 8 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.

• Considerations: Will an AHMR caregiver/employee be surveyed as a participant in the conduct of the project?
  □ You will need to include a clean copy of your survey or questionnaire along with

requirements at AHMR.

  o Identifiable PHI is not accessible to AHMR employees who are in a student role and intending to use identifiable PHI in a project for an academic degree when the project is done at AHMR

  o PHI may only be used by a student when the PHI has been de-identified by an AHMR employee with approved access to electronic health records and/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 AHMR may only be done when an additional data user agreement is put in place. Data user agreements are enacted between the school and the clinical site and require time for legal review and approval (this is only applicable for research studies)
the completed Human Subject Research Determination Form.

- Employees and employee time are of high value. We encourage you to limit the use of surveys.

- **Question 1:** Is the project designed to contribute to generalizable knowledge?
  - Results from evidence-based practice projects and performance improvement projects are not considered “generalizable knowledge”. Therefore, answer **no** to all the 5 sub-questions listed here.
  - 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”.

- **Question 2:** Describe the reasons for conducting the proposed EBP/QI project.
  - The reasons for conducting the proposed project are those things you have discussed and written about when doing your proposal for class.
  - A brief summary of your background and significance that you identified from the literature combined with the demonstrated need from the identified project site should be included in this response.
  - Include a summary statement that captures the benefits of the project for the patients, the site, or the employees.

- **Question 3:** Provide a brief synopsis of the project, including objective(s)
  - Your objective(s) must be realistic, clearly written, and measurable.
  - Each objective should measure only one outcome.
  - How will you recruit your participants?
  - 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 4:** Will the project involve testing an experimental drug, device (including medical software or assays), or biologic? **CHOOSE ONE** (Note: Answer should be no).

- **Question 5:** Will the project involve testing a new tool or survey that has not been previously validated? **CHOOSE ONE** (Answer should be no. Note: QI/EBP projects often use tools/surveys to obtain information to achieve project goals. These methods are not used to validate tools/measures).

- **Question 6:** List all sites where it is expected for this project to be conducted:

- **Question 7:** Will AHMR medical records of living individuals be accessed during this project? **CHOOSE ONE** (Note: Refer to the process of limited use of de-identified data).

- **Question 8:** Describe the subject population/type of data/specimens to be studied.
  Indicate whether the data/specimens will be identifiable, entirely de-identified, or whether the data/specimens will be linked by any code or identifiers (e.g., name, medical record number, date of birth, zip code, etc.)

□ It is highly recommended the site leader is aware and approves of your project before implementation.
Your preceptor can facilitate this approval.

- Submit your project summary and HSR determination form to IRBNet. Be sure to lock, sign, and submit the package. If there is an issue with the package, you will be notified by the IRB to make changes. Follow the instructions received via email as additional errors will delay the process.
- Please check the IRBNet website frequently for the status of your application and your decision letter. The turnaround time to receive the determination letter from IRBNet is several weeks.

Submit the determination letter to your school.

**Step 3 – Begin site-based onboarding as a student to your AHMR location through Nursing Clinical Affiliations (this is not the same as onboarding with your academic institution).**

The faculty chair or University designee submits an electronic placement request through myClinicalExchange (mCE).

- Once your placement has been approved by AHMR student affiliations, you will begin onboarding. This must be done with each course/semester or yearly (Jan-Dec) until your project is completed. Onboarding instructions for all AHMR sites are available on the Nursing & Medical Assistant Clinical Placement website.
  
  **NOTE:** If you are in consecutive semesters, the school must still send in your placement request for each course/semester or year. However, we can use the paperwork and orientation from the beginning of the program.

**Step 4 – Conducting the Project**

- Adhere to the project protocol you identified in the approved Human Subjects Research Determination Form.
- Biostatistician support for MSN/DNP student projects is not available at Advocate Health. Support should be sought through your program/school of nursing.
- 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 a 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 before public release.
- Plan an internal AHMR presentation. AHMR often expects students to present completed projects to appropriate groups within our organization. Your preceptor can help you find internal presentation venues. It is important to protect the site. When presenting please use generic language when describing the site, findings, etc. If you are an AHMR team member, it is recommended that you prepare/submit an abstract to present your work at our yearly Nursing Conference.