UAB The University of
Alabama at Birmingham.

School of Nursing

Orientation & On-Boarding Guidelines

FOR SON ORS Grant Staff

2025-2026

OFFICE OF RESEARCH & SCHOLARSHIP

WELCOME TO THE ORS
The Office of Research & Scholarship

ORS POWERS PEOPLE & PARTNERSHIPS FOR BETTER HEALTH

The ORS is committed to leading solutions for critical health care issues facing the US and the world today. Further, the ORS is committed to excellence in collaborative partnership initiatives within the UAB academic health science center as well as throughout the University. The SON research faculty and staff are partners in a wide scope of interdisciplinary research in the key areas of chronic condition management, palliative and supportive care, caregiving, and health systems and implementation science, among others.

LEARN MORE ABOUT THE RESEARCH IN THE SON
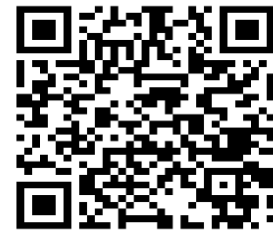
As with any new job, clinical research coordinators (CRCs) at all levels have a great deal to learn, both about their specific project and about UAB structure and processes. Some processes are specific to the School of Nursing (SON) and some apply University-wide. We hope these guidelines will direct you to answer many common questions and concerns as you start your position or continue in your efforts as a SON Clinical Research Coordinator.

These guidelines can also be found on the website ➡ QR CODE | Other information and trainings relevant for CRCs will also be located at this site.

Frequently Needed Phone Numbers

Building and Facilities Issues Security, & OneCard	John Markle	205-975-0313	**jtmarkle@uab.edu**
	Doug Smith	205-975-7974	**smithd15@uab.edu**
Computer Issues	Alan Glaze	205-975-5336	**aglaze@uab.edu**
	AskIT	205-996-5555	**askit@uab.edu**
Human Resources	Lily Williams	205-934-5429	**lilymp@uab.edu**
	Latrichia Threatt	205-996-8100	**lthreatt@uab.edu**
Office of Research & Scholarship	Bernice Dunklin	205-996-0093	**bdunklin@uab.edu**

Initial Onboarding

Blazer ID

As a new hire, you are required to create a UAB Blazer ID before you can access UAB services. If you previously had a Blazer ID and are starting as a new SON employee, you will need to "activate" your Blazer ID at the link below. If you've never had a Blazer ID, please visit the link below and click on "Register Blazer ID" on the left side of the screen. It may take a few days to activate your UAB email.

→ **One Stop Blazer ID**

Please notify Latrichia Threatt at **lthreatt@uab.edu** when you have working email.

ONE Card

Once your hiring document (ACT) is complete, your ONE card badge will be issued. You will receive an email when you are able to pick it up (at Medical Towers, Suite 101). More information about the ONE card can be found here. → **One Card**

UAB Portal

The UAB portal can be reached at →**My UAB**. It contains campus time & attendance (for hourly employees and time away), the UAB directory, Oracle HR, Finance, IRAP, and more.

Computer and Printer Setup

Contact **Alan Glaze** at the SON to help set up your computer and give you access to a printer. **aglaze@uab.edu**
Contact UAB ASKit for other computer/network issues. **askit@uab.edu**

Human Resources

Contact **Lily Williams** (**lilymp@uab.edu)** or **Latrichia Threatt** (**lthreatt@uab.edu**) for any questions regarding your position or benefits.

Communication

Zoom

Zoom offers a range of features including video and audio conferencing (which can be recorded and transcribed), screen sharing, chat, and more. →**UAB Zoom**

Teams

Microsoft Teams is a cloud-based platform designed for team collaboration, communication, and meetings. →**Link to UAB Teams**

BOX

Box is a cloud-based storage system to access secure files from anywhere. Tutorials for using Box can be found at this link. →**UAB Box Storage**

LMS (Learning Management System)

Online learning and development for required and elective courses can be found via this link. → **UAB Online Learning**

CRCNs

CRCs working at any UAB affiliated hospital may need other onboarding. Some possible needs are listed below.

Travel Badge

If you will be performing research activities at UAB entities including the Kirklin Clinic, Whitaker Clinic, UAB Hospital, or any other UAB Medicine facility, you are required to obtain traveler privileges. A traveler is defined as any person who is not employed by UAB Hospital or Health Services Foundation who comes into an ambulatory clinic setting to perform care, treatment, services, or research. See the → **New Traveler Orientation Request Form** for more information on how to obtain your Traveler Badge.

UABMC email

Email **helpdesk@uabmc.edu** with request, your username, and the reason for requiring a UABMC email.

Access to Power Chart

Training is available via **nettrain@uabmc.edu**

Hospital Computer Issues

Call Health System Information Services (HSIS) (205-934-8888) for hospital-related computer issues such as problems accessing medical records.

Required Trainings for all CRCs

UAB Required Trainings

UAB requires training courses for all new hires which must be completed within 2 weeks of your hire date. SON employees must complete the following trainings which can be found at →**UAB Online Learning**

- **HIPAA**: Health Insurance Portability and Accountability Act
  This training must be completed within 5 days of your appointment date.
- **FERPA**: Family Educational Rights and Privacy Act of 1974

- **OSHA**: Bloodborne Pathogens (for CRCs who will enter a clinical setting)
- **Disability Support Services Training**
- **Title IX: Building Supportive Communities**

IRB Training

In addition to the required CITI training, UAB offers optional training which is designed for both new and experienced users to provide guidance regarding the IRB, the protocol submission lifecycle, and how to use the ePortfolio to submit an initial application. Users who complete this course will be able to utilize IRAP, successfully submit an IRB application, and locate support for the IRAP system. → **IRB Initial Application Training**

All UAB employees who will be affiliated with human subjects must comply with the federal and state laws applicable to research with human subjects. There are options available for different training depending on the content of your study. → **IRB Training Options**

→ **OIRB Virtual Office Hours**

IRB virtual office hours are every other Thursday by Zoom and are very helpful.

HIPAA Training

HIPAA encompasses the rules that protect health information including privacy and security. It covers all personally identifiable health that is oral, electronic, or paper. The SON HIPAA officer is Becky Wakefield (205-975-2481). Required HIPAA training can be accessed through the campus learning system at →**UAB Online Learning**
See more information from the →**Office of Civil Rights**

Good Clinical Practice

IRAP

 IRAP provides UAB researchers with a system which integrates the management of grant proposals, research agreements, regulatory protocols, disclosures, training/certifications and licenses.
→**IRAP Training**
The system accomplishes these tasks with a series of configurable workflows, e-forms, alerts, linked records and a robust library of reports →**Office of Research e-Reports**
*IRAP is currently transitioning to "myUABResearch"

Hospital Trainings

ONCore

- Financial system used for clinical trials. For individualized training contact **OnCoretraining@uab.edu**
- Additional information can be found at the ➔**CCTS Clinical Trails Kiosk**

Data Storage

Electronic Data

UAB IT offers multiple storage and collaboration options to meet the needs of faculty, staff and students. They have created ➔**a matrix** to help you identify the best storage option for the data you plan to store. Please be aware of the ➔**policies** regarding storage of restricted or sensitive information in the cloud.

ALL DATA MUST BE STORED ON AN APPROVED UAB NETWORK DRIVE. Options include BOX, OneDrive and Sharepoint. **No data can be kept on portable devices unless approved by the Associate Dean for Research and Scholarship and encrypted.**

Paper Data

Paper data for active projects must be stored in a locked drawer in a locked room with the location directed by your PI. Data with participant identifying information must be kept in a separate file/cabinet away from the de-identified data. All signed informed consent sheets must be kept in their paper form for three years from the end of the project.

UAB SON Financial Overview

Financial processes may be different at the SON than at other UAB schools or offices. The SON Office of Financial affairs offers ongoing training and is available for questions via **SON-finance@uab.edu**

SON Finance Team

- Kristina Akins **keakins@uab.edu**
- Suzanne Grant **smgrant@uab.edu**
- Tamara Nix-Parker **tmnixpar@uab.edu**
- Grace Pate **gpate@uab.edu**

Money Minute

Biweekly session on TEAMS by the SON finance team. New CRCs should request access by emailing **SON-Finance@uab.edu**

Finance Training

→**UAB Financial Affairs** contains training on many topics.

Purchasing

IProcurement

iProcurement is a web-based form that is used to create Purchase Order Requisitions in the Oracle HR & Finance Administration System. Purchase Order Requisitions are internal requests for goods and services. They are sent electronically from the preparer to the approvers. Once the requisitions are approved by Central Administration, a Purchase Order Number is generated. → **iProcurement – Financial Affairs**

Buy UAB

Buy UAB is an electronic procurement system using the p-card to buy from preapproved vendors. This is the preferred method for purchasing commonly used items. All pre-approved vendors are listed via this link →**BuyUAB**

P-card

The P-card works like a credit card and is used with Buy UAB to order supplies/materials from listed vendors. Information about requesting and using a P-card can be found at the following link →**PCard**

Learn how to use the P-card in Appendix 1

ePayment request

Payment requests are used for employee reimbursement or to pay vendors when items are not ordered through Buy UAB. →**Employee Reimbursement**

Learn how to make an ePayment Request in Appendix 2

Object Codes

Object codes are a string of numbers which represent the expense being requested when making a "payment request." It can be difficult to determine the correct object code for a particular item. The list of all object codes can be found here →**Object Code List Financial Affairs** Contact SON Finance if you get stuck.

OnBase

OnBase is a document management system for the submission of Oracle Journal Entries, Payment Requests, Purchase Order Requisitions, and PCARD Review supporting documentation. It is also where supporting documentation for invoices can be viewed. →**UAB OnBase**

More information about OnBase can be found in Appendix 2

Journal Entry

Journal entries are used to transfer/reclassify expenses from one account or object code to another. See the video tutorial here →**Creating GL Journal Entries video tutorial**

Effort Reporting

Employees paid in full or partly from a grant must certify a quarterly effort report each quarter documenting their effort on each grant that is paying them. It is important to review your effort report prior to certifying it and report any discrepancies to the Director of ORS Operations (Cathy Tarver). →**Effort Reporting Certification Flowchart - Financial Affairs**

Paying Research Participants/Greenphire

Research participants are paid using a ClinCard which is a reloadable prepaid Mastercard. New research studies need to set up a Greenphire account. See the links below for instructions.

- → Greenphire Site Coordinator - Financial Affairs
- → ClinCard New Study Set-up Application - Financial Affairs

Workflow/Adobe Sign

Adobe Sign is used to collect electronic signatures and route documents automatically to all required signers. Adobe sign can be accessed through the UAB portal at →**My UAB**. Select the required form from the library on the site and follow the instructions on the form.

Travel

There are numerous regulations regarding travel by UAB faculty and staff. Information relevant for all UAB employees such as per diem reimbursement limits for airfare, food, gas, lodging, etc. can be found at this link. →UAB Financial Affairs Travel

See Appendix 3 for SON specific information about the SON Goldenrod form, routing documents, and other required documents and processes.

Contracts

Contracts can have many stages and are often complicated. The links below may be helpful. It may be best to contact the UAB SON Director of Operations of Grants Development, Review & Management, Ms. Cathy Tarver **cotarver@uab.edu** for more instructions when initiating a contract.

→ Contracting – Financial Affairs
→ How To: Initiate a Contract – Financial Affairs
→ How To: Upload Documents and Submit the Contract – Financial Affairs
→ https://www.uab.edu/financialaffairs/contracting/sample-contracts

Additional SON Resources

SON Intranet

The link to the SON Intranet (SharePoint) can be found at the bottom of the SON homepage. The intranet contains information about employee resources, staff council, remote access, learning and development opportunities and marketing, among other useful information.

SON Website

The →**SON website** contains a great deal of information about all aspects of the SON mission including education, service, and research.

The →**Research section of the SON Website** contains information about research faculty, ongoing research projects, research opportunities and more, and is the place to locate many needed forms and contacts.

SON employees cannot add or change information on the SON website. All requests must go through the →**UAB SON Marketing link on the intranet**. CRCs wishing to recruit participants through social media must also go through the link under Marketing on the intranet.

UAB Resources

Center for Clinical and Translational Science

The →**UAB CCTS** was initially funded in 2008 and has been at the forefront of innovative research aimed at reducing the burden of cardiometabolic, vascular, and cancer-related diseases that disproportionately affect the Deep South. The CCTS partners with 11 academic health centers, research institutes and universities across Alabama, Mississippi, and Louisiana. The CCTS offers many resources and much support for faculty, clinician-scientists, trainees, students, staff, research professional and community members. The Clinical Research Support Program (CRSP) may be particularly useful to CRCs through training courses and seminars. See →**CRSP** for more information.

Additional IRB Resources

The IRB Guidebook serves as a thorough resource detailing ethical compliance, regulatory requirements, and best practices for formulating research protocols involving human subjects. →**IRB Guidebook**

Decision support tools assist researchers in accurately categorizing their studies. These support tools and the Review Category Fact Sheets can be found at →**IRB Decision Support Tools**

Lister Hill Library

James Gilbreath is the SON liaison and can be reached at (205) 934-2231, or by email at jngilb@uab.edu.

Appendix
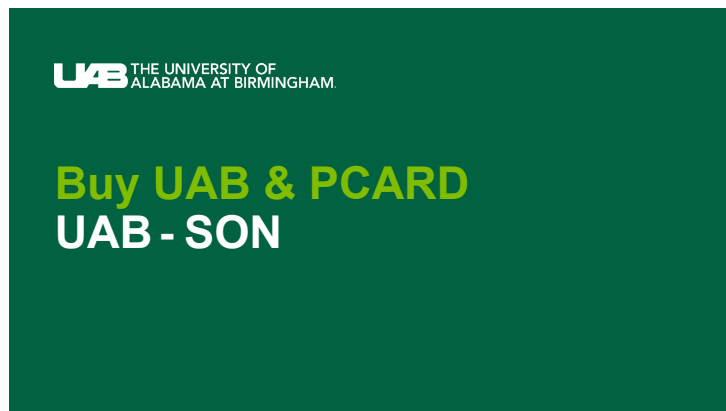
I. PowerPoint Tutorial - Buy UAB & PCard

II. PowerPoint Tutorial -Payment Requests

III. PowerPoint Tutorial – Processing Travel Requests