NEW STUDY COORDINATOR CHECKLIST
You may have already completed some of the following UAB tasks as a part of your new employee orientation.

Create a BlazerID and strong password
- Go to https://idm.uab.edu/bid/reg
- If you try to register a BlazerID, and the system reports that it cannot find you in its records, then the personnel paperwork may not have cleared yet to get you into the system — try again in a day or two.
- Read the guidance on the page and use the links on the left-side of the page for answers to common issues / questions about BlazerID. Note: BlazerIDs are not changed. Choose wisely.

UAB One Card
- Go to https://www.uab.edu/onecard
- Choose "Manage My Card" tab (top horizontal). This should be completed in UAB orientation, but if not, choose One Card Request form under Manage my Card.

HIPAA and Diversity Awareness Training
- UAB Office of Compliance & Risk Assurance and the Office of Diversity, Equity and Inclusion websites are helpful; training is completed via the Campus Learning System
- Go to www.uab.edu/learningsystem (Google Chrome and Firefox browsers work best)
- Select “Learning System (LMS) Login”
- Log in using your BlazerID and password

IRB Training and Financial Conflict of Interest Training
- Go to https://www.uab.edu/research/home/irb-training-page and click on Initial IRB Training
- Most new employees utilize CITI Basic-Biomedical or Behavioral-Course in Human Research Protections
- Choose “yes, I have a BlazerID” to Register for IRB Initial Training and enter the University of Alabama, Birmingham on the next screen.
- Choose View Courses and start the IRB -Basic Course
- UAB’s required training course for Financial Conflict of Interest is available through the Campus Learning System. The course is entitled "Financial Conflict of Interests in Research". Log-in with BlazerID and password and search for FCOI.
- Submit a Disclosure of Financial Interests

You must complete the following for Children’s of Alabama (COA) access to Epic.

COA Security Access
Submit security access request form: https://www.jotform.com/coa-hris/security
- For the field that asks for Department, enter “UAB Pediatrics.”
- If you need a physical badge, attaching your own photo is optional. You may also have your photo taken at COA Security. After submitting the online form, you will need to go to the COA Security Office located near the gate arms at the entrance to the 5th Avenue Parking Deck (corner of 5th Avenue and 19th Street (Captain D’s side of parking deck) to pick-up your badge. Questions? Contact COA Security (205) 638-9682.
COA Non-Employee Affiliate Account Request
This form is required for all non-Children’s affiliates (UAB staff, students, trainees, etc.)

Go to https://form.jotform.com/coa-hris/affiliate. Use the following instructions.

At a minimum, mark the following:

- Network/PC/VDI Use Only
- Epic role: Research Coordinator

For this field, enter the date you are filling out the form, or a past date, if appropriate.

For this field, provide your UAB department name (example Department of Pediatrics).

Fill in this field as indicated with Regina Mason’s email address:

regina.mason@childrensal.org

This should be the manager who will assign training and approve system access.
For this field, choose UAB Peds Only Staff:

For this field, please enter the title you would have on your badge or in a directory:

Follow any instructions emailed from COA HRIS and/or COA Provisioning Security for 2-factor authentication.

**COA Epic Training Request**
Once you have a COA network ID (a CHS#), you will submit an Epic Training Request form. This is available on the IT Support Portal (Ivanti: [https://coahelp.saasit.com](https://coahelp.saasit.com)). See the next page for the job aid that outlines the steps for filling out the form.
# How to Request for Epic Training

<table>
<thead>
<tr>
<th>Action</th>
<th>Visual</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the Children’s Red Wagon Intranet, click the <strong>IT Support Portal</strong> menu item on the left. The Ivanti Service Manager page appears.</td>
<td><img src="image" alt="Ivanti Service Manager" /></td>
</tr>
<tr>
<td>2. Enter your Children’s <strong>ID</strong> and <strong>password</strong> and then click <strong>Submit</strong>.</td>
<td><img src="image" alt="Service Catalog" /></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Filter Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Service Catalog" /></td>
</tr>
<tr>
<td>The IT Support Portal dashboard appears.</td>
<td><img src="image" alt="Epic Incidents" /></td>
</tr>
<tr>
<td>3. Click the <strong>Service Catalog</strong> option.</td>
<td><img src="image" alt="Filter Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Service Catalog" /></td>
</tr>
<tr>
<td>Filter Options appear on the left to help narrow the service type.</td>
<td><img src="image" alt="Filter Options" /></td>
</tr>
<tr>
<td>4. Select the <strong>IT Education Services</strong> checkbox.</td>
<td><img src="image" alt="Service Catalog" /></td>
</tr>
<tr>
<td>5. Deselect any other checkboxes.</td>
<td><img src="image" alt="Popular Items" /></td>
</tr>
<tr>
<td>The service catalog in the center will update with an option to request Epic Training.</td>
<td><img src="image" alt="Epic Training Request" /></td>
</tr>
<tr>
<td>6. Click the <strong>Epic Training Request</strong> option.</td>
<td><img src="image" alt="Epic Training Request" /></td>
</tr>
<tr>
<td>A pop appears for the Epic Training Request.</td>
<td><img src="image" alt="Epic Training Request" /></td>
</tr>
<tr>
<td>7. Click the <strong>Request button</strong> to continue.</td>
<td><img src="image" alt="Epic Training Request" /></td>
</tr>
<tr>
<td>A form appears for you to enter your request details.</td>
<td><img src="image" alt="Epic Training Request" /></td>
</tr>
</tbody>
</table>
8. Complete the form and then click the **Review and Submit button** at the bottom.

**Note:** Once a request is submitted, the requester will receive an email confirmation.