

Research St. Joseph's – Hamilton (RSJ-H)		Pages 1 of 6	Number 064-RSJ-H
Policy Title Research Visitors, Visiting Fellows and Research Volunteers		Date 15 July 2019	
Supersedes June 7, 2016	Cross Reference 002-RSJ-H; 013-RSJ-H; 063-ADM; 090-ADM	Issuing Authority RSJ-H Scientific Director	
<input checked="" type="checkbox"/> Charlton Campus	<input checked="" type="checkbox"/> West 5th Campus	<input checked="" type="checkbox"/> King Campus	

Position responsible for developing and maintaining the policy: RSJ-H Scientific Director

1.0 PURPOSE & GOALS DESCRIPTION

Research and academia are integral to the St. Joseph's Healthcare Hamilton (SJHH) mission. The Research Institute of St. Joe's Hamilton (RSJ-H) provides opportunities for Research Visitors, Visiting Fellows and Research Volunteers to participate in scientific exchange, collaboration and experience in a research environment. The purpose of this policy is to provide direction and guidance when Research Visitors, Visiting Fellows and Research Volunteers will be engaged with RSJ-H or an affiliated researcher of RSJ-H and will have access to RSJ-H resources and facilities not otherwise available to the public.

2.0 SCOPE

2.1 This policy applies to Research Visitors, Visiting Fellows and Research Volunteers of RSJ-H.

2.2 This policy does not apply to anyone subject to or covered under:

- (i) the employee policies of RSJ-H or SJHH;
- (ii) the visitor or volunteer policies of SJHH;
- (iii) learners under the *Learner Placements at SJHH Policy* (063-ADM);
- (iv) researchers affiliated or associated with RSJH under the *Research Affiliation with Research St. Joseph's – Hamilton Policy* (002-RSJ-H); and/or
- (v) the McMaster University affiliation agreement(s) in place with SJHH and/or RSJ-H.

2.3 For clarity, this policy *does apply* to those Learners who are *also* simultaneously Research Visitors.

3.0 DEFINITIONS

3.1 Affiliated Researcher

An individual who meets one of the categories of association and has completed the annual affiliation and required training process and is in good standing with RSJ-H pursuant to the *Research Affiliation with Research St. Joseph's – Hamilton Policy* (002-RSJ-H) and the *Workplace Training Requirements Policy* (013-RSJ-H).

3.2 Designated Supervisor

An Affiliated Researcher and/or individual approved by the RSJ-H Scientific Director and/or RSJ-H Executive Director.

3.3 Learner

An individual who is registered either full-time or part-time in a recognized post-secondary educational institution and who is required to complete a placement (either clinical, non-clinical academic or research based) in order to graduate. Please refer to www.joinstjoes.ca/learners for more information.

Research St. Joseph's - Hamilton policies are **CONTROLLED** documents. Any documents appearing in paper form are not controlled and should **ALWAYS** be checked against the intranet version (electronic version) prior to use.

3.4 Research Visitor

An individual employed, enrolled, or appointed by an academic institution or by another entity that will be collaborating with an Affiliated Researcher with respect to a research activity for a specified period of time. For greater certainty, this includes any students who are registered either full-time or part-time in a recognized post-secondary educational institution, *and who are conducting research activity outside of academic course requirements*. Research Visitors do not include (i) Affiliated Researchers, (ii) employees of RSJ-H, SJHH, or McMaster University, (iii) Visiting Fellows, or (iv) Research Volunteers.

3.5 Research Volunteer

A volunteer who will perform or observe a research related activity willingly and without pay for RSJ-H or an Affiliated Researcher of RSJ-H. The research volunteer will come to RSJ-H or an Affiliated Researcher seeking research related opportunities to support personal goals and learning experiences. Engaging as a research volunteer is primarily for the benefit of the volunteer, not for RSJH or an Affiliated Researcher. This does not include SJHH Volunteers who will be under the administration of SJHH.

3.6 SJHH Volunteer

A SJHH volunteer is defined as a person who performs a service willingly and without pay for SJHH. The volunteer will come to SJHH seeking various opportunities to support personal goals and learning experiences. Please refer to <http://www.joinstjoes.ca/volunteer> for more information.

3.7 Visiting Fellow

An individual who wishes to gain research exposure to increase knowledge and skills in different aspects of research and visits RSJ-H to take part in some or all of teaching, observing, training, lecturing, or performing research on a topic the visiting fellow is valued for, and/or RSJ-H is valued for. Fellow will develop relationships with Affiliated Researchers who may wish to participate in future (international) projects.

4.0 DESCRIPTION OF ROLE AT RSJ-H

4.1 Research Visitor with RSJ-H will:

- Be employed, enrolled or appointed by an academic institution or another entity.
- Collaborate directly with an Affiliated Researcher for a defined period of time.
- Be involved in a specific program of research, research study or project at RSJ-H.
- Will not receive any pay, compensation or benefits from RSJ-H (including without limitation, a parking pass).

4.2 Visiting Fellow with RSJ-H will:

- Hold the degree of M.D. or Ph.D. or equivalent training or experience.
- Engage in some or all of: teaching, observing, training, lecturing, and/or performing research.
- Interact with Affiliated Researchers.
- Visit for up to a maximum of twelve months at the sole discretion of RSJ-H.
- Not receive any pay, compensation, or benefits (including without limitation, a parking pass).
- Be solely responsible for all costs (including without limitation, insurance, accommodations and travel).
- Receive recognition, by way of a letter or certificate, for the fellowship completed from the Designated Supervisor.

4.3 Research Volunteer with RSJ-H will:

- Be at least eighteen years old.
- Perform the volunteer role for a limited number of months and/or limited number of hours per week at the sole discretion of RSJ-H.
- Not receive any pay, compensation, or benefits (including without limitation, a parking pass).
- Receive recognition, by way of a letter or certificate, for the volunteer hours provided from the Designated Supervisor.

5.0 POLICY

5.1 Onboarding

Designated Supervisor must, prior to the arrival of a Research Visitor, Visiting Fellow or Research Volunteer, ensure that the appropriate documentation has been completed, submitted to, and approved by RSJ-H and that any and all screening and onboarding requirements of RSJ-H have been met.

5.2 Immunizations

5.2.1 The Communicable Diseases Surveillance Protocols for Ontario Hospitals, developed by the Ontario Hospital Association and the Ontario Medical Association, approved by the Ministry of Health and Long Term Care, pursuant to Hospital Management Regulation 965/90 of the Public Hospitals Act, applies to all people who carry out activities within hospitals.

5.2.2 If applicable, neither RSJ-H nor SJHH shall be responsible for the cost or expense for the Research Visitor, Visiting Fellow or Research Volunteer, as applicable, to obtain any required immunizations.

5.3 Responsibility for Supervision and Oversight

5.3.1 All Research Visitors, Visiting Fellows and Research Volunteers must be directly supervised by a Designated Supervisor, who shall be responsible for that individual at all times while performing their role at RSJ-H.

5.3.2 Without limiting the foregoing, in particular, the Designated Supervisor will be responsible for the following with respect to the Research Visitor, Visiting Fellow or Research Volunteer, as applicable:

- Determining and overseeing appropriate activities.
- Ensuring supervision is provided to the level consistent with the knowledge and training and the task assigned.
- Providing access to appropriate SJHH and RSJ-H guidelines, policies and procedures and ensuring compliance with them.
- Ensuring adequate training, certification and orientation is provided to conduct the activities being performed.
- Ensuring completion of all occupational health and safety requirements.
- Ensuring any security requirements of RSJ-H or SJHH, including obtaining an identification badge are met.
- Arranging for any computer access required through the RSJ-H Research System Analyst.

- Ensuring appropriate permissions, authorizations or consents are in place for any access to any confidential, proprietary or private information.
- Ensuring that Hamilton Integrated Research Ethics Board or the applicable Board of Record is informed of all study involvement or changes, including personnel changes or additions, for studies or other research projects that require ethics board approval.
- Ensuring RSJ-H administration is informed of any changes in the status, including but not limited to end dates.

5.3.3 In order for a Designated Supervisor to be permitted to supervise a Research Visitor, Visiting Fellow or Research Volunteer, they must be in compliance with all RSJ-H policies and procedures, including completion of mandatory training requirements, and they must remain in compliance with the foregoing for the duration of the term of supervision.

5.4 Patient Access

5.4.1 A Research Visitor, Visiting Fellow, or Research Volunteer may access patients or patient information only if the following requirements are met:

- They have completed the required training.
- All SJHH or RSJ-H credentialing requirements have been met.
- It is under the direct supervision of the Designated Supervisor, who supports the activity.

5.5 Prohibited Activity

5.5.1 A Research Visitor, Visiting Fellow, or Research Volunteer **must not**:

- Borrow or accept money, gifts or any other items of value from patients, research subjects, sponsors, or vendors.
- Violate any applicable privacy or confidentiality guidelines, policies, procedures, agreements, or legislation.
- Violate any policies or procedures of RSJ-H or applicable SJHH policies.
- Breach any training, certification or orientation requirements.
- Engage in any activities at RSJ-H/SJHH outside their designated roles, as defined by their Designated Supervisor.
- Give medical advice or engage patients in clinical or medical conversations.
- Lift, touch, or feed patients.
- Exchange contact information with patients, study subjects, sponsors, or vendors.
- Sign anything on behalf of RSJ-H or SJHH or serve as a witness to any signatures.

5.5.2 If a Research Visitor, Visiting Fellow, or Research Volunteer engages in any prohibited activity, or if that individual or their Designated Supervisor fails to abide by the terms of this policy, the *RSJ-H Scientific Director*, in his/her sole discretion, may take appropriate action as required without any RSJ-H liability whatsoever.

5.6 Status in Canada

- 5.6.1 All Research Visitors, Visiting Fellows or Research Volunteers must be either:
- (i) a Canadian citizen, or
 - (ii) a permanent resident, or
 - (iii) have a valid work permit to work in Canada, for the entire duration of their time at RSJ-H.
- 5.6.2 In this regard, the Research Visitor, Visiting Fellow, or Research Volunteer must obtain his/her own expert advice on any requirements (depending on the nature of their visit) of the Government of Canada or other governmental or regulatory authority. Neither RSJ-H nor SJHH is responsible for advising any Research Visitor or Visiting Fellow regarding their need for a visa or work permit.
- 5.6.3 Lack of appropriate documentation will lead to removal of the individual from the premises and RSJ-H may take any other appropriate action as required.

5.7 Insurance

- 5.7.1 Research Visitors, Visiting Fellows and Research Volunteers:
- Are **NOT COVERED BY WORKPLACE SAFETY AND INSURANCE BOARD (WSIB)**.
 - Are **NOT COVERED BY RSJ-H or SJHH FOR HEALTH INSURANCE OR PERSONAL ACCIDENT INSURANCE**, and it is their responsibility to purchase this insurance independently, if in their sole discretion they choose to.

5.8 Status

- 5.8.1 Under no circumstances shall a Research Visitor, Visiting Fellow and/or Research Volunteer be considered or deemed to be at any time an employee of RSJ-H or SJHH.
- 5.8.2 For greater certainty, a Research Visitor, Visiting Fellow and Research Volunteer of RSJ-H **will not** be entitled to receive from RSJ-H or SJHH any of the rights and benefits afforded to RSJ-H or SJHH employees, including without limitation, participation in any benefit or pension plans, vacation pay, overtime pay, termination pay, or severance pay. Neither RSJ-H nor SJHH shall be required to pay for or maintain any employee benefits for the Research Visitor, Visiting Fellow or Research Volunteer, including without limitation, WSIB, CPP, employer health tax, employment insurance and other similar levies, nor to make withholdings and remittances.

6.0 PROCEDURE

- 6.1 Utilize Section 3.0 (Definitions) and Section 4.0 (Description of Role at RSJ-H) to determine which category of Research Visitor, Visiting Fellow, or Research Volunteer, requirements are necessary.
- 6.1.1 The Designated Supervisor is required to complete the necessary documentation and register the Research Visitor, Visiting Fellow or Research Volunteer with Research Administration at RSJ-H.

- 6.1.2 The *RSJ-H Scientific Director* and/or *RSJ-H Executive Director* must provide written approval prior to the Research Visitor, Visiting Fellow or Research Volunteer commencing activities at RSJ-H.
- 6.1.3 The Research Visitor, Visiting Fellow or Research Volunteer must complete all RSJ-H and/or SJHH requirements prior to commencing activities at RSJ-H.

7.0 DOCUMENTATION

- 7.1 All required documentation must be completed prior to starting at RSJ-H.
- 7.2 The documentation, training and other requirements for Research Visitors, Visiting Fellows and Research Volunteers are provided through the Research Personnel Request portal at:
<https://rsjh.ca/RPR>

8.0 REFERENCES

Research Affiliation with Research St. Joseph's – Hamilton Policy (002-RSJ-H)
Workplace Training Requirements Policy (013-RSJ-H)
Learner Placements at SJHH Policy (063-ADM)
Privacy of Personal Information (090-ADM)

9.0 SPONSOR

- The Research Institute of St. Joe's Hamilton

10.0 IN CONSULTATION WITH

- Academic Learner Coordinator
- St. Joseph's Healthcare Hamilton Volunteer Services
- St. Joseph's Healthcare Hamilton Medical Affairs