

## Working with a KPSOM Student on Research/Scholarship

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This document was developed to help physicians of The Permanente Medical Group (TPMG) efficiently navigate required approvals and access support for research or scholarship with KPSOM students.

1. Helping TPMG physicians and KPSOM students connect
  - All TPMG physicians: Physicians with research ideas seeking to work with a KPSOM student may list a proposed project in the KPSOM Project Catalog by contacting the Senior Associate Dean for Research and Scholarship (Jonathan Finkelstein, MD, [jonathan.a.finkelstein@kp.org](mailto:jonathan.a.finkelstein@kp.org)). Students may also use other mechanisms to connect directly with a TPMG physician in a specialty of interest.
  - Physicians who are Division of Research (DOR) investigators: KPSOM solicits ideas from investigators for the KPSOM Project Catalog and connects students with investigators who are faculty in KPSOM's Health System Science Department. DOR also has an identified liaison to the school (Julie Schmittdiel, PhD, [Julie.a.schmittdiel@kp.org](mailto:Julie.a.schmittdiel@kp.org)) who can facilitate when helpful.
2. Supports for scholarly projects with KPSOM students
  - a. All KPSOM students have human subjects (CITI) training acceptable to the NCAL IRB and are fully trained in use of HealthConnect and in patient privacy (HIPAA).
  - b. The KPSOM Office of Research and Scholarship provides assistance with navigation of administrative tasks (IRB, Data Transfer agreements, etc.) and limited analytic and statistical support (with appropriate data transfer agreements).
  - c. The KPSOM is working with TPMG to identify a project coordinator and a data analyst who can devote part of their effort to guiding and supporting selected projects with navigation and/or limited data extraction/analysis within KPNC.
3. When an idea for a project that will involve data analysis (either a quality improvement project or a research study subject to Institutional Review Board review) looks likely to move forward, the TPMG physician should communicate with the appropriate TPMG regional leader about the plan before it's solidified. The purpose is to make productive connections and allow leaders to provide input on any potential sensitivities.

The TPMG physician should email the regional chair for their specialty (including primary care, medical or surgical specialty) a short description of the planned project, with a cc to the director of the Biostatistical Consulting Unit (BSCU) (Juleon Rabbani, DrPH, [Juleon.W.Rabbani@kp.org](mailto:Juleon.W.Rabbani@kp.org)).

The regional chair should review the plan to:

- Identify potentially helpful connections, and put the attending physician and/or student in touch with others who have similar or synergistic research interests, if applicable;
- Identify and manage potential sensitivities, for example, possible disclosure of information that would put the organization at a competitive disadvantage or potentially harm its reputation.

The regional chair and BSCU director are welcome to confer with the regional Physician Advisor for Medical Education Research (Tracy Lieu, MD, [tracy.lieu@kp.org](mailto:tracy.lieu@kp.org)) if they have any questions.

4. The required approvals vary with project type and are the responsibility of the TPMG Physician. Questions or requests for assistance with navigation can be addressed to the BSCU director, [Juleon.W.Rabbani@kp.org](mailto:Juleon.W.Rabbani@kp.org).

<b>Type of project</b>	<b>Notifications of physician leaders</b>	<b>Patient consent</b>	<b>Research Determination Team review and IRB approval</b>	<b>Data Use Agreement</b>
Case reports and case series of up to 4 cases	Notify Director of Medical Education at the medical center	Obtain patient consent, if needed, using standard consent form	Research Determination Team review encouraged; IRB approval not required	None required
Quality improvement project or research subject to IRB review	Notify Director of Medical Education at the medical center and the regional specialty chair	Obtain patient consent if required by the Research Determination Team or IRB	Seek Research Determination Team review to determine whether IRB review is needed	Required if the plan includes data sharing or analysis by any person or entity outside KPNC

IRB, Institutional Review Board

**FAQs for projects that require analysis of computerized data**

Q1: Can TPMG supply a programmer/analyst to do a project’s analysis?

A: The KPSOM is working with TPMG to arrange limited support for selected projects with navigation and/or limited data extraction/analysis within KPNC. The level of support is typical of that required for identifying patients for case series or chart review studies, or simple statistical tests for data derived from chart review, etc. This scope will be smaller than the support provided to resident, fellow, or Community Health projects.

Q2: Can a project's analysis be done by another KPNC department?

A: Projects being done for other purposes that have resources already assigned may involve students. Due to resource constraints, it's not usually possible for departments to do analyses primarily for the purpose of a student project.

Q3: Can the data be analyzed by a KPSOM programmer/analyst or another analyst with KP?

A: Yes, if the required approvals including a Data Use Agreement have been obtained.

Q4: Can the KPSOM student analyze the data?

A: Yes, if the required approvals including a Data Use Agreement have been obtained.