

Educational Assignments

...and other research activities

Description & Process

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THE UNIVERSITY OF
CHICAGO

**Office of
Research Safety**

What are Educational Assignments?

Educational Assignments are opportunities for student(s) to obtain a short-term, noncredited, educational experience either ad-hoc or for a formal program. The age range is unlimited. This would include post-docs, students from other institutions, elementary and high school students, and students from the UChicago Lab School. Group field trips which take place in a lab are also in this category.



What are Educational Assignments?

Note: Educational Assignments are not volunteers, they are students coming to the University of Chicago, not for credit, but for the benefit of an educational experience.

Non-Degree Visiting Students are a type of educational experience for foreign students. These are managed by BSD HR in collaboration with the Office for International Affairs (OIA) and ORS as needed. There are fees involved.

What are other research activities?

Other research activities would be defined as the following:

- Visiting Researchers (IBC, IACUC, Medicine, etc.)
- Externships (ARC)
- UChicago Medicine Shadow Experience
- Fellowships

Currently enrolled students of UChicago would fall in the category “Other research activities.” These include fellowships. A request is required in order to keep an attendance record on file and to schedule Lab Safety training.

Additionally, a “Formal Program” would be an established program that occurs, typically, on an annual basis, for which an application for program acceptance is required but there is no tuition or credit issued. This is a “continuing education” type of experience but sponsored through an official program.

Some examples of a formal program include- Research Experiences for Undergrads, EYES, UCCCC, High School Teachers Summer Research Program of the American Association of Immunologists, Collegiate Scholars Program, Pathways, Pritzker Summer Research Program, Space Explorer Program, Expanding Your Horizons, researchHStart, CURE, RIBS, etc.



Who are the stakeholders?

Completion of forms and submission:

- Student, Fellow or Visitor
- Parents/Guardians
- External Academic Organization
- Principal Investigator (PI) or Supervisor
- HR Partner

Once submitted, reviewed by:

- Employee & Labor Relations (ELR)
- Risk Management (RM)
- Volunteer Dept. (BSD HR)
- Youth Group Program Coordinator (YGPC)
- Office of Research Safety (ORS)

Educational Assignments Committee:

Designated representative(s) from ELR, RM, BSD HR, YGPC, ORS

Types of Educational Assignments?

	*Educational Assignment	*Non-Degree Seeking Student	Visiting Researcher	*UChicago Student	*Volunteer	UCM Shadowing Experiences	Fellowships
Description	A structured learning opportunity for a minor or non-minor with a defined and reasonable set of goals. The EA provides mentored oversight, and the opportunity is primarily for the benefit of the minor or non-minor and not others.	A structured learning opportunity for undergrad/graduate students who will come to UChicago to work with a specific PI. They will only receive credit toward their degree from their home institution, usually international.	Professional or Post-Doc Researcher visiting campus to work with a specific PI.	UChicago Students may want to gain additional experience pertaining to their major or minor by performing work in an internship or not related to an internship.	Unpaid individuals on campus who volunteer for specific events.	Potential Residents or students considering medical school.	Undergrad, grad and alumni fellowships
Form(s)/ Documents Required	Volunteer & Educational Assignment Proposal	Forms are electronically managed via BSD HR	Visiting Scientist form	None- should be simplified but it is needed to keep a record	Volunteer form	Volunteer & Educational Assignment Proposal	http://ccrf.uchicago.edu/
Location	ORS Website	BSD HR	ORS Website	ORS Website			BSD and College
Governing Policies	ORS Training Policy, ORS PPE Policy, ORS EAs in the Lab Policy, ORS Lab Safety Roles and Responsibilities	ORS Training Policy, ORS PPE Policy, ORS EAs in the Lab Policy, ORS Lab Safety Roles and Responsibilities Non-degree Visiting Students Policy	ORS Training Policy, ORS PPE Policy, ORS Lab Safety Roles and Responsibilities	ORS Training Policy, ORS PPE Policy, ORS EAs in the Lab Policy, ORS Lab Safety Roles and Responsibilities	Volunteer Policy (revised)		ORS Training Policy, ORS EAs in the Lab Policy, ORS Lab Safety Roles and Responsibilities
Routed Required Approvals	ELR/HR, ORS, requesting PI	BSD HR, ORS, requesting PI	ELR/HR, ORS	ELR/HR, ORS	ELR/HR		
Related Departments	HR, RM, ORS, requesting dept.	HR, RM, ORS, requesting dept.	HR, BSD HR, RM, ORS, requesting dept.	HR, RM, ORS, requesting dept.	HR, RM, requesting dept.		



Why do we need a process?

The educational assignment and/or other research activities is just one of the many generousities that UChicago offers to thriving students from all over.

Educational Assignments and Visiting Researchers are not processed through Workday. For liability reasons, and to benefit the student, we need to keep a record of their presence on file. We need to review their proposed activities to ensure they are consistent with policies. Then we use the description of the activities to determine and deliver the associated laboratory safety training.

Another reason for this process is to trigger a safety check on the designated laboratory. ORS checks to make sure the laboratory successfully passed their most recent inspection and that there are no additional potential hazards that could affect the student or visitor.



What forms are needed?

The forms listed can be found on the Office of Research Safety's website:

<https://researchsafety.uchicago.edu/programs/educational-assignments-and-other-research-activities/>

- [Educational Assignment Proposal \(minor <17\)](#)
- [Educational Assignment Proposal \(adult >18\)](#)
- [Educational Assignment Proposal \(groups\)](#) (cohorts
• of individuals for formal programs, field trips, tours)



Proposal for an Educational Assignment or Visitor
in a Laboratory or Other Research Activity

Assignment proposals must be submitted to Human Resources (HR) at least two weeks before the beginning of the assignment. Completed forms should be sent to elrelations@uchicago.edu.

Assignment Type (check one):	
<input type="checkbox"/>	Unpaid individual Educational Assignment (no stipend)
<input type="checkbox"/>	Paid individual Educational Assignment (with stipend)
<input type="checkbox"/>	Fellowship
<input type="checkbox"/>	Research Experience for Undergraduates (REU)
<input type="checkbox"/>	Field Trip (Group)
<input type="checkbox"/>	Uncredited Formal Program (individual or group)
<input type="checkbox"/>	Visitor (Professional – 1-5 days, i.e. Visiting Researcher, Visiting Fellow, UCM shadow)
<input type="checkbox"/>	Visitor (6 days or more)

Assignment Description:	
<input type="checkbox"/>	Hands-on activities (manipulating reagents or materials)
<input type="checkbox"/>	Research
<input type="checkbox"/>	Operational Support
<input type="checkbox"/>	Observation of daily operations only
<input type="checkbox"/>	Tour of facility of department

Indicate type of environment where assignment will be held:	
<input type="checkbox"/>	Wet lab (e.g. where hazardous chemicals or biological materials are stored or manipulated)
<input type="checkbox"/>	Dry lab (e.g. computer lab)
<input type="checkbox"/>	Workshop/machine shop (e.g. shop where potentially hazardous equipment is operated)
<input type="checkbox"/>	Studio (e.g. art studio)
<input type="checkbox"/>	Outdoors/in the field
<input type="checkbox"/>	Office Environment



Who does what?

The **PI** or **supervisor** and the **student**, or **minor student's parents/guardians** are responsible for completing the appropriate forms and passing them to the department's corresponding HR Partner.

The **HR Partner** will submit the paperwork to ELR.

ELR reviews to ensure that the assignment is educational in nature and confirms that assigned tasks, that would resemble work, should be performed by a paid employee.

ELR forwards their approval with the documents to the designated individuals in the applicable department(s), which may include any combination of the following:

BSD Volunteer Dept., Risk Management, the Youth Group Coordinator, and the Office of Research Safety.



Who does what?

If there is a minor involved, the next step is to route the forms to **Risk Management**, the Youth Group Coordinator, to confirm that all corresponding to the minor have DCFS clearance and/or is not on the national sex offender registry

After Risk Management, or if the EA is an adult, the forms are routed to the Office of Research Safety.

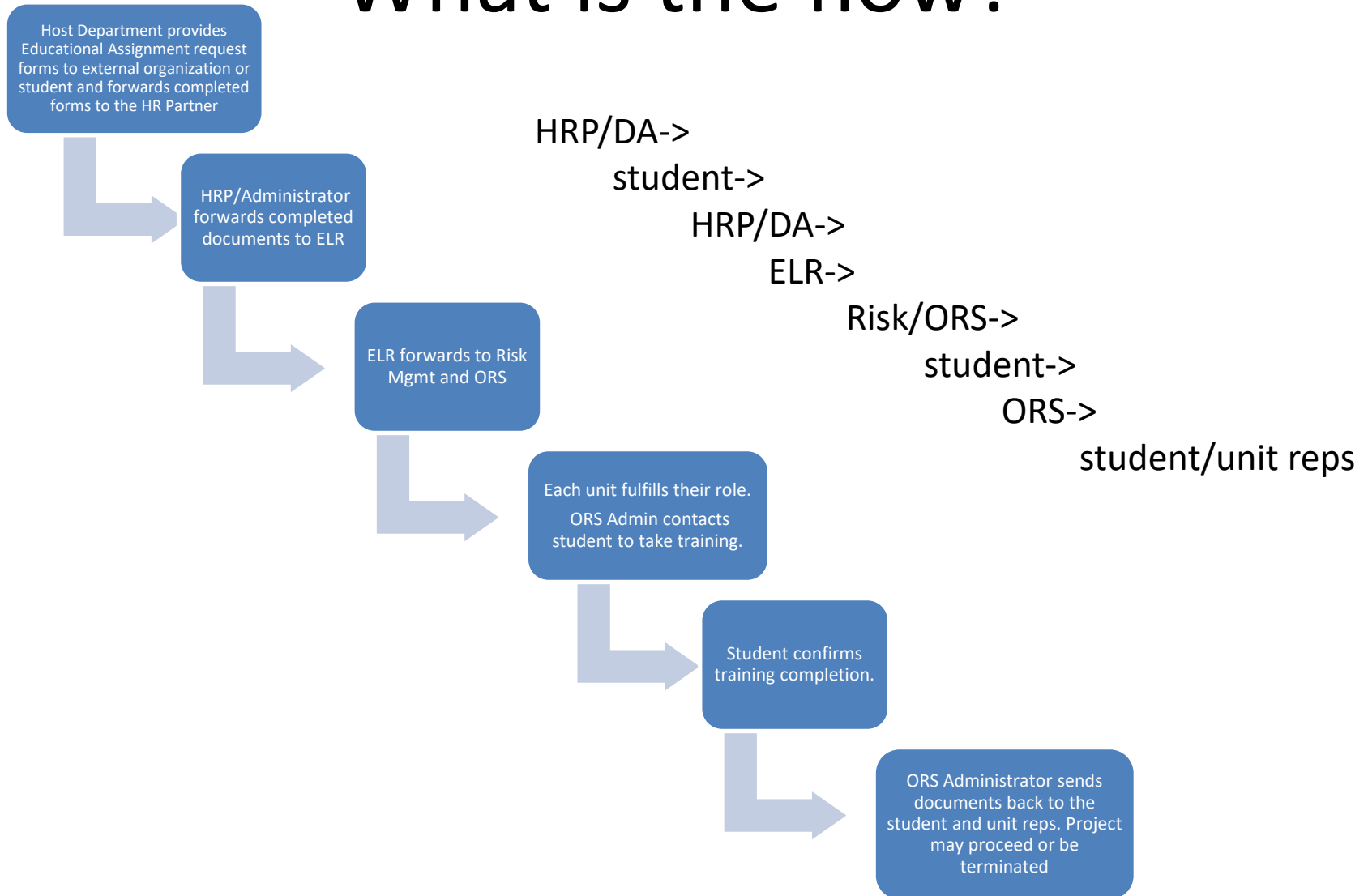
The **ORS** Administrator will check if there are any wet lab/research labs involving biological, chemical or radiation hazards on the hazard assessment and assign an ORS Safety Officer to process a risk assessment, deliver the applicable training and check the recent lab inspection.

Who does what?

The ORS Safety Officer will inform the ORS Administrator whether to proceed with approval.

- i. After the ORS Administrator receives confirmation that safety training has been completed, the signed documents are emailed back to ELR, the HR Partner, the Department Administrator (if listed) the student/visitor, and any PI's and Supervisors listed.
- ii. If the applicant or PI does not respond to the ORS Safety Officer or Administrator within 2-weeks of first contact, the application will be denied.
- iii. No assignment can begin until all members of the committee has approved.

What is the flow?



Educational Assignments vs. Volunteers

Educational Assignments

Activity type:

- Tour
- Observation
- Collaboration (hands-on)

Participant:

Minors:

- Consent and indemnification required
- Visiting Student (elementary and high school)

Adults:

- Visiting Scientist (faculty, technician, post-doc)
- Visiting Student (undergrad, graduate)

Restricted Activities:

- Performing work involving the handling or storage of blood, blood products, or body fluids or tissues;
- Handling Risk Group 2 pathogens;
- Working with carcinogens, teratogens, or mutagens;
- Handling radioactive substances;
- Using radioactive devices;
- Entering animal research facilities;
- Working with animals.

Prohibited Activities:

- Entering BSL3 laboratories or ABSL3 animal facilities;
- Entering Select Agent registered laboratories or SA animal facilities;
- Working in an area or performing activities requiring the use of a respirator;
- Handling Risk Group 3 pathogens;
- Operating Class III Lasers;
- Working in areas with possible exposure to lead or its compounds;
- Working with substances present on the OSHA particularly hazardous substances list;
- Working in areas where explosives or articles containing explosive components are used or stored;
- Working in a Machine Shop



Educational Assignments vs. Volunteers

Volunteers

There are no restricted activities for Volunteers.

Prohibited Activities:

- Performing work involving the handling or storage of blood, blood products, or body fluids or tissues;
- Handling Risk Group 2 or Risk Group 3 pathogens;
- Working with carcinogens, teratogens, or mutagens;
- Handling radioactive substances;
- Using radioactive devices;
- Entering animal research facilities;
- Working with animals.
- Entering BSL3 laboratories or ABSL3 animal facilities;
- Entering Select Agent registered laboratories or SA animal facilities;
- Working in an area or performing activities requiring the use of a respirator;
- Operating Class III Lasers;
- Working in areas with possible exposure to lead or its compounds;
- Working with substances present on the OSHA particularly hazardous substances list;
- Working in areas where explosives or articles containing explosive components are used or stored;
- Working in a Machine Shop



Minors in the Laboratory

Minors aged 14-17 years old are **prohibited** from working with the following hazardous materials or in the following hazardous environments:

- i. Entering BSL3 laboratories or ABSL3 animal facilities;
- ii. Entering Select Agent registered laboratories or SA animal facilities;
- iii. Working in an area or performing activities requiring the use of a respirator;
- iv. Handling Risk Group 3 pathogens;
- v. Operating Class III Lasers;
- vi. Working in areas with possible exposure to lead or its compounds;
- vii. Working in areas where explosives or articles containing explosive components are used or stored;
- viii. Working in a Machine Shop; 11.

Minors aged 14-17 years old are **restricted*** when working with the following hazardous materials or in the following hazardous environments:

- i. Performing work involving the handling or storage of blood, blood products, or body fluids or tissues;
- ii. Handling Risk Group 2 organisms;
- iii. Working with hazardous chemicals;
- iv. Handling radioactive substances; v. Using radioactive devices;
- v. Entering animal research facilities;
- vi. Working with animals.

*Appropriate training and supervision must be provided prior to these activities being initiated.



What are the relevant policies?

- [Educational Assignments in the Lab Policy](#)
- [Minors in the Lab Policy](#)
- [Non-Degree Visiting Student Policy](#)
- [Volunteer Policy](#)
- [Research Safety Education and Training Policy](#)
- [Personal Protective Equipment Policy](#)
- [Institutional Roles and Responsibilities](#)

