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Introduction

The Joanna Briggs Institute (JBI) is an international not-for-profit research and development organisation located within the Faculty of Health Sciences at the University of Adelaide. We collaborate internationally with almost eighty (80) JBI entities across the world that subscribe to our definition of what constitutes evidence and our methodologies and methods in relation to evidence synthesis and the translation of evidence into action at the policy and practice level. The Institute and its collaborating entities promote and support the synthesis, transfer and utilisation of evidence through identifying feasible, appropriate, meaningful and effective healthcare policies and practices to assist in the improvement of healthcare outcomes globally.

We work closely with the Cochrane Collaboration and the Campbell Collaboration and encourage the conduct of reviews of effects (involving the meta-analysis of the results of randomised controlled trials) through Cochrane Review Groups.

Our strength is in the conduct of systematic reviews of the results of research that utilize diverse research approaches, particularly qualitative research, economic research and policy research. This broad, inclusive approach to evidence is important when the association between health care and social, cultural and economic factors is considered.

JBI oversees a large international education and training program accessed by clinicians, researchers, health scientists and library scientists from over 50 countries with over 2000 participants completing JBI courses in the past three years, focusing on the systematic review of evidence and the translation of evidence into action. Most of the Institute’s fifteen short, non-award courses available as part of the Institute’s educational program are delivered by the staff of JBI in the Institute’s headquarters located on the North Terrace Campus of the University of Adelaide in Adelaide, Australia. Because of our global focus and in line with our mission to achieve global health through the translation of the best available evidence into action – the Institute established a “train the trainer” program in 2005. This program focused on preparing appropriately qualified and experienced people to deliver the JBI Comprehensive Systematic Review Training Program (CSRTP) to participants unable to attend it in Adelaide. In 2012, a similar program for Trainers to deliver the JBI Clinical Fellowship Program (CFP) was introduced.

The CSRTP was initially developed in 1999 and has been offered since then by the scientific staff of JBI as both a short, non-award course and as part of the postgraduate degree programs offered by the Institute within the Faculty of Health Sciences at the University of Adelaide. The Train the Trainer program “licenses” those who are not members of the Institute or the University of Adelaide to legitimately deliver training based on the Institute’s intellectual property and accredits those who complete programs delivered by licensed trainers and provides them with a certificate of completion.
The train-the-trainer program is offered on a fee-paying basis to interested persons who are not associated with the Institute; and on a gratis basis to JBI Collaborating and Affiliated Centres.

To date, over one hundred (100) trainers have been licensed and JBI Trainers are located in Australia, Hong Kong, Singapore, Taiwan, Myanmar, Cameroon, Kenya, Ethiopia, Ghana, Scotland, England, Wales, Denmark, Finland, Romania, Spain, Switzerland, Canada, Brazil and the US (in Texas, Indiana, Oklahoma, California and New Jersey). To ensure that our Systematic Reviews are consistently of high quality, the Institute accepts only reviews conducted by JBI-accredited reviewers. Accredited reviewers must complete the JBI Comprehensive Systematic Review Training Program; use the JBI software; and maintain their skills by completing an on-line reviewer update-training program every two years. The Institute maintains a database of licensed trainers and of accredited reviewers.

The CFP was launched in 2004 and prepares leaders to translate evidence into action in policy and practice. JBI Clinical Fellows become part of the International Fellows Alumni.

In licensing trainers who are not members of the Joanna Briggs Institute or the University of Adelaide, the Institute permits the use of the internationally known JBI “brand” and of the University of Adelaide’s intellectual property. To protect the reputation of the Institute and the University of Adelaide; and to maintain consistency in the training of JBI reviewers and JBI Fellows, the Institute is required to ensure that trainers:

- demonstrate a thorough understanding of the courses they are licensed to teach;
- uphold the standards and principles held by the Institute;
- deliver JBI courses without variation; and
- consistently identify the source of the materials used in JBI courses through the use of JBI branding in all training materials.

Licensed Trainers (and their host Center) sign a formal Trainers Agreement that sets out the requirements for delivering JBI courses. This handbook details all of these requirements and the expectations of JBI Trainers.

Professor Alan Pearson AM
Professor of Evidence Based Healthcare and Executive Director
The Joanna Briggs Institute.
Faculty of Health Sciences. The University of Adelaide. Australia.
June 2012
1. The Joanna Briggs Institute as a Provider of Education and Training

The Joanna Briggs Institute (JBI) was founded in 1996 with a mission to promote and facilitate evidence-based best practice globally. A central part of this mission is the provision of education, training and thought leadership. Today, we are recognised internationally as an innovator in evidence-based healthcare.

As a leader in developing skills and advancing knowledge about evidence-based healthcare, JBI’s Adelaide staff and staff in our Centres and Groups located all over the world are influential in shaping theoretical and practical developments in evidence synthesis, evidence transfer and the translation of evidence into action in health policy and health and aged care service delivery. Our alumni and membership network is vast, reaching the highest levels of business, government and non-profit organisations across the world, affirming the value of JBI education and training experiences.

The intellectual capital of our well qualified, multidisciplinary, enthusiastic and motivated training staff in Adelaide and in our Centres is a key distinguishing feature of all of our programs, and is essential to who we are as a leading evidence-based health care organisation. These trainers play a key role in enhancing understanding, providing solutions and offering insights and sharing foresights about evidence-based health care.

We are proud that we have created a culture built on integrity, teamwork and an entrepreneurial spirit and are well versed in adapting to emerging challenges and opportunities.

Using our extensive network of staff, alumni, leading international experts on our Advisory Board of Studies, and members throughout the world - we constantly create new forums and learning programs that challenge conventional thinking about evidence-based health care.
Our Courses

Three short, non-award courses are offered on a face-to-face basis on the Adelaide campus:

1. JBI COnNECT+ - 5 steps to Evidence-based Practice;
2. Evidence-based Clinical Fellowship Program; and

Eight short, non-award courses will be offered online in 2012/2013:

1. Introduction to Evidence Based Healthcare (via Sigma Theta Tau International (STTI));
2. Models for Evidence Based Practice (via Lippincott, Williams and Wilkins (LWW));
3. Hierarchies of Evidence (via LWW);
4. The Five Steps of Evidence Based Practice (via LWW);
5. Setting up a Clinically Based Journal Club (via LWW);
6. JBI Practical Application of Clinical Evidence System;
7. RAPid Critical Appraisal Program; and
8. Comprehensive JBI Systematic Review Training Program

Two short, non–award courses are offered on other sites around the world, by Trainers licensed by the Institute:

1. Evidence-based Clinical Fellowship Program; and
2. Comprehensive JBI Systematic Review Training Program.
Our Advisory Board of Studies

All short, non-award courses are peer reviewed annually by international experts who, collectively, form the Institute’s Advisory Board of Studies. Membership of the Advisory Board of Studies in 2012 consists of:

- **Dr Patricia Benner**, Professor, School of Nursing, University of California, San Francisco, USA;
- **Caroline De Brun**, Information Scientist, NHS Institute for Innovation and Improvement, Coventry House, University of Warwick Campus, Warwick, UK;
- **Dr Mahmoud El Barbary**, National and Gulf Centre for Evidence Based Medicine, King Abdulaziz University of Health Sciences, Riyadh, Kingdom of Saudi Arabia;
- **Professor Adrian Esterman**, Foundation Chair of Biostatistics, School of Nursing and Midwifery, University of South Australia, Adelaide, Australia;
- **Dr Ian Graham**, Vice-President of Knowledge Translation, Canadian Institutes of Health Research, Ottawa, Canada;
- **Professor Morag A Gray**, Associate Dean (Academic Development) & Senior Teaching Fellow, Faculty of Health, Life & Social Sciences, Napier University, Edinburgh, UK;
- **Professor Angela Harden**, Professor of Community and Family Health, Institute For Health And Human Development, University of East London, UK;
- **Dr Janet Harris**, Course Director, MPH in International Health Management and Leadership, School of Health and Related Research (ScHARR), University of Sheffield, Sheffield, UK;
- **Dr Margaret Harrison**, Professor and Senior Scientist, Practice and Research in Nursing Group School of Nursing, Queen’s University, Kingston, Ontario, Canada;
- **Dr Lisa Hopp**, Professor, School of Nursing, Purdue University, Calumet, Indiana, USA;
- **Professor Andrea Rita Horvath**, Professor of Clinical Chemistry, University of Szeged, Hungary;
- **Dr Jos Kleijnen**, Kleijnen Systematic Reviews Ltd, Westminster Business Centre, York, UK;
• **Dr Joy MacDermid**, Associate Professor, School of Rehabilitation Sciences, McMaster University, Canada

• **Dr Dan Mayer**, Professor of Emergency Medicine, Albany Medical College, Albany, USA;

• **Fiona Morgan**, Information Specialist, Support Unit for Research Evidence, Cardiff University, Heath Park, Cardiff, UK;

• **Dr Denise O’Connor**, Senior Research Fellow, Australasian Cochrane Centre, Monash University, Melbourne, Australia;

• **Dr Susan Salmond**, Dean, School of Nursing, University of Medicine and Dentistry of New Jersey, Newark, USA;

• **Dr Alan Schwartz**, Associate Professor & Director of Research, Department of Medical Education, University of Illinois at Chicago, USA;

• **Dr Nirav R. Shah**, Assistant Professor of Medicine, Associate Director for Research at NYU School of Medicine, and Associate Investigator at the Geisinger Center for Health Research, New York, USA;

• **Dr Steve Simon**, P. Mean Consulting, Leawood, Kansas, USA;

• **Dr Woan Shin Tan**, Health Services & Outcomes Research, National Healthcare Group, Singapore;

• **Professor Ken Walsh**, Professor of Nursing, South Eastern Sydney & Illawarra Area Health Service / University of Wollongong, Wollongong, Australia; and

• **Dr Albert Wu**, Senior Advisor, Patient Safety Research Program, WHO Alliance for Patient Safety, World Health Organisation, Geneva, Switzerland.
Our Processes to Advance the Quality of Teaching and Learning

The Institute, as a School within the Faculty of Health Sciences at the University of Adelaide, is committed to advancing and improving teaching and learning. The Teaching and Learning Committee (TLC) is a subcommittee of the Institute’s Collegial Board and provides guidance to:

- all scientific staff of the Institute in relation to effective and appropriate teaching and learning;
- the Collegial Board on matters related to teaching and learning; and
- the Executive Director on teaching and learning within the Institute and the overall coordination of the structured program for HDR students and to all short courses.

The Associate Director – Communications Science (Dr Zoe Jordan) is responsible for the coordination of all short courses and effectively liaises with, and seeks guidance from, the External Advisory Board of Studies.

The TLC consists of the Director - Communications Science (as Chair); the Executive Director and Program Directors; and all Research Fellows. The TLC addresses:

- the annual review of the content, teaching and learning processes and assessment strategies of all short, non-award courses by the Advisory Board of Studies;
- the ongoing maintenance of data related to the enrolment, completion and subsequent certification (where appropriate) for all courses;
- challenges, difficulties or problems staff are experiencing in terms of teaching and learning and potential strategies to overcome them; and
- possible supports, solutions or strategies that may assist staff to provide effective, creative and high quality teaching and learning.

The Minutes of each TLC are a standing Collegial Board agenda item. The TLC refers, when required, matters to the Collegial Board, and the Collegial Board may resolve to make recommendations to the Executive Director on matters referred by the TLC.
2. Our Approach to Teaching and Learning

Introduction

The offering of a large number of short, non-award courses is, in and of itself, an unusual role for a University School; and the licensing of others outside the University to teach courses developed by the Institute is unique within the University of Adelaide (and probably most other universities).

JBI courses are offered on behalf of JBI and the University of Adelaide and it is therefore important that the reputation and standing of JBI and the University of Adelaide are maintained at all times. To maintain consistency in the content of courses and in the teaching and learning processes employed, all short, non-award courses are developed by a course team; consist of a “package” of materials; and are peer reviewed by external experts. Institute staff and licensed Trainers all facilitate teaching and learning in the same way through the use of the approved course materials. Thus, teaching and learning relies less on the individual characteristics of those who teach; and more on the delivery of content using a common approach.
The Role of JBI Teachers/Trainers

JBI staff and accredited Trainers are health scientists and/or health professionals with a background in research, evidence review and/or knowledge translation who have completed a JBI Train-the-Trainers program. Accredited Trainers are required to:

- Successfully complete the JBI Train-the-Trainer program
- Be a member of staff of the Joanna Briggs Institute or be a Clinical or Affiliate title holder within the Institute
- Sign the Trainer Agreement (Appendix 1)
- Deliver the Comprehensive Systematic Review Training Program as designed by JBI and without variation
- Use all provided training materials¹
- Register all participants with JBI
- Remit the royalty fee for each participant registered to JBI
- Notify JBI of the successful completion of each module and request accreditation/certification of the participant
- Submit an annual training report to JBI using the pro-forma provided; and
- Successfully complete the required continuing professional education (as set out in the Trainers Handbook) and submit an annual CE report

Accredited Trainers, in being granted a license to become approved providers of JBI education and training, are expected to

- Demonstrate detailed working knowledge of the JBI-SUMARI software suite
- Ensure that the program includes all of the relevant software user exercises, conducted in accordance with the training materials
- Maintain a high level of professionalism
- Maintain their knowledge and skills in teaching and in the content of JBI programs
- Promote JBI, the Cochrane Collaboration and other evidence based practice groups
- Promote JBI Evidence Synthesis Groups/ JBI Evidence Utilisation Groups, and
- Encourage participants to conduct JBI Systematic Reviews or JBI-PACES cycles using JBI software.

¹ That is, Power points, study guides, workbooks, assessment sheets and evaluation forms with the University of Adelaide and JBI branding intact. Trainers may add additional logos/branding but may not remove those of the University of Adelaide and JBI.
Ongoing Professional Development of JBI Teachers/Trainers

JBI staff and accredited Trainers are required to stay abreast of developments in evidence synthesis or evidence utilisation. To maintain accreditation after completing an initial Train-the-Trainer program, all licensed trainers must demonstrate their continued development in conducting training as specified by JBI. Failure to meet these requirements will result in the withdrawal of the license to deliver JBI courses.

Policies Relevant to Teaching and Learning

Policy on the conferring of Clinical and Affiliate Titles

People from outside the University of Adelaide make a significant contribution to the achievement of the goals of the University. The University honours their contribution to its endeavours in teaching and research by conferring on them a title, which reflects their activity, and acknowledges the mutual obligations in the relationship.

The provisions of this policy apply to persons who are not members of the academic staff of the University of Adelaide and who make appropriate contributions to its academic work.

A titleholder is a person who is not a member of academic staff and who has been awarded a title by the University of Adelaide under this or related policies. School is used in this policy, but should be taken to mean the Joanna Briggs Institute. The University may confer an academic title on a person who agrees to make an appropriate significant contribution to its academic work for a specific period of time. To be eligible for a title a person must meet the specific eligibility criteria outlined in the Guidelines and meet an identified need of the University.

Applications and nominations for the conferment of titles for all levels under this policy must be submitted (on the prescribed form – Appendix 2) through the Executive Director to the Executive Dean of the Faculty of Health Sciences, who will decide whether to confer the title with the exception of professorial titles. The Vice-Chancellor and President will determine the conferral of professorial titles.
Criteria for Conferment of a Title:

Assessment for the conferment of a title on an individual shall take into account:

• The person’s eligibility;
• The extent of his or her expected contribution;
• The person’s academic or research standing;
• Specific criteria relevant to particular titles as listed in the Guidelines; and
• Duties, Obligations, Conditions and Privileges.

Conferment of a title obliges the titleholder to:

• Comply with designated University of Adelaide policies and codes of practice, and any other direction given by the Executive Director or his nominee;
• Undertake teaching, research, student supervision and other activities to the standard agreed by the Faculty, and as negotiated with the University;
• Make satisfactory alternate arrangements for all agreed commitments, if they are not able to meet their undertaking; and
• Certify they are not using the intellectual property, including copyright, of any third party in the work without authorisation in the work they undertake on behalf of the University.

Titleholders do not have the authority to bind the University to any agreement, contract or other legally binding agreement. The University may seek to recover from a titleholder loss, expense or damage suffered as a result of a titleholder acting in breach of this provision.

In conferring the titles available under this policy the University acknowledges its responsibility for:

• Providing titleholders with access to direction, facilities and processes which enable them to effectively make their contribution, subject to the discretion of the University having regard to its resources and objectives;
• Bona fide acts or omissions of its titleholders which occur during the performance of their role, are reasonably related to that capacity and are not in breach of any law or University policy; and
• Maintaining research and teaching standards.

Titleholders have an obligation to advise the University of any circumstances which may lead to liability.

The contribution of a titleholder is voluntary. However in some instances titleholders may be paid, provided their remuneration is not pursuant to a fixed term or continuing academic appointment. The issue of payment is not related to the conferment of the title.
Duration and Cessation of Title
The titles conferred under this policy will be for a specified duration of up to 3 years and may be renewed if the candidate makes a further commitment. The Executive Dean, or in the case of professorial titles, the Vice-Chancellor and President, may suspend or withdraw titles and any benefits associated with them at any time.

Academic titles
The academic titles listed below may be conferred:

- Clinical Associate Lecturer (Tutor), Lecturer, Senior Lecturer, Associate Professor, or Professor; or
- Affiliate Associate Lecturer, Lecturer, Senior Lecturer, Associate Professor, or Professor.

Policy on the use of the JBI Logo

The JBI logo was designed when the Institute was established in 1996 and is representative of the JBI ethos and the dissemination of information internationally. The red pebble of knowledge and surrounding blue ripples are recognised internationally as the Institute’s trademark and is used on all Institute publications, resources and promotional materials and symbolises the significant effect that dropping a single pebble can have.

The logo depicts a ‘pebble of knowledge’, representing the way in which a single piece of knowledge can be a powerful catalyst for continuous change, surrounded by blue ripples that represent the expanding impact of change.

The JBI pebble logo is used on all membership related resources contained within JBI COnNECT+. It is this logo that appears on all resources offered as part of membership or other JBI related subscriptions offered through WKH (i.e. through Lippincott, Williams and Wilkins or through Ovid). This logo is not to be utilised by any other JBI partners or collaborators.
Policy on the use of the JBI Crest

The JBI crest may only be used alongside the crest of the University of Adelaide in the format presented above. The JBI crest was designed in 2007 and consists of a shield containing the symbol of a pebble being dropped into water (the Institute’s logo since its establishment in 1996). This is superimposed upon a depiction of the globe, referring to the Institute’s mission of improving global health. The globe also reminds us of the nature of the collaboration of Joanna Briggs Centres. The motto, Aequam Servare Mentem – to keep a clear mind – is an allusion to the Institute’s purpose of maintaining an objective, clear mind when making decisions.

The colours of the crest are burgundy (PMS194) ‘pebble of knowledge’, and 30% scale globe, with a backlit gradient from white to dark blue (PMS288) along with black text and banner. The crest may be used in colour or in a slightly modified alternate version for one colour printing.

The crest is for exclusive use by the Institute for all scientific and corporate activity including education and training.

When the crest appears on training materials it must not be removed or re-imaged in any way.

Policy on Intellectual Property

Intellectual property rights to any content of any kind arising from a staff member employed with the Joanna Briggs Institute remains the property of the Institute and its governing entity(ies).

The Joanna Briggs Institute retains the intellectual property rights of all short, non-award courses.
Policy on citing JBI materials
All publications of the Institute are cited in a conventional manner with originating authors. The only exception is the “Best Practice” series that is cited as being authored by The Joanna Briggs Institute (JBI).

For example:

Books:

Journal articles:

Best Practice sheets:

Evidence summaries/Recommended Practices:


Policy on conducting JBI systematic reviews
JBI has as its central focus the effectiveness, appropriateness, meaningfulness and feasibility of health practices and delivery methods. The Institute regards any indication that a practice is effective, appropriate, meaningful or feasible, that is derived from experience, expertise, inference, deduction or the results of rigorous inquiry, as a form of evidence. The JBI regards the results of well designed research studies grounded in any methodological position as providing more credible evidence than anecdotes or personal opinion; however, when no research evidence exists, expert opinion can be seen to represent the “best available” evidence.

The CSRTP is designed to train reviewers who will, in turn, conduct reviews. Increasing the production of reviews is the raison d’être of the CSRTP.
The JBI Approach to Systematic Reviews:

- The JBI follows the methods developed by the Cochrane Collaboration for reviews of effects and methods developed through JBI for all other review types;
- The JBI approach is set out in the JBI Reviewers’ Manual; and
- JBI only publishes reviews led by reviewers who have completed the JBI comprehensive systematic review training program.

Systematic reviews published by JBI are normally completed by Collaborating and Affiliate Centres for Evidence Review, Evidence Synthesis Groups associated with Collaborating Centres and postgraduate research students of the JBI.

Based on the approach of the NHS Centre for Reviews and Dissemination at the University of York, a JBI review is undertaken by a designated reviewer who works with a review panel. JBI recommends that review panels be formed on commencement of a new protocol, or on update of an existing systematic review.

The review panel should consist of experts in review methods, experts in the content area, and lay consumer input.

All JBI reviews MUST be undertaken using JBI-SUMARI.

The JBI Process for Conducting Systematic Reviews

Any entity considering doing a JBI review should first check there are no existing systematic reviews on the topic (e.g. check JBI, Cochrane, Medline and CRD as a minimum); check that there are no existing protocols on the topic (e.g. check JBI, Cochrane and PROSPERO as a minimum); and check the Title Registration Page to ensure the title has not been registered by another entity in the preceding 6 months.

Entities are encouraged to use the Title Registration Page available through the JBC Intranet Web Page to register their intent to develop a protocol and conduct a review before starting and before submission to the Synthesis Science Unit (SSU). If there are no existing reviews and no existing titles the entity is able to register the title and then have 6 months to complete a protocol on that title. (Please note that title registration does not require formal approval). If the protocol is not completed within 6 months (approved by the SSU and uploaded on the JBI Web Site) then the title is flagged as being available to any potential reviewer.

A protocol must be submitted to the Institute for peer review and approval prior to commencement of the systematic review. When approved the protocol will be placed on the JBI COnNECT+ website.
From the start of registration of a protocol, a period of no longer than 2 yrs from that date shall be considered appropriate for the completion of a systematic review report. The following considerations apply:

- when a draft review report has not been submitted within 2 years authors will be required to formally request an extension in writing. Extensions will be able to be granted by the SSU for a maximum of one year subject to authors demonstrating that substantial work has already occurred; that no problems are likely to occur in relation to the relevance and currency of the review; and that there is a strong likelihood they will be able to complete the review within the extended period;
- authors shall be able to elect to advise the SSU to make their reviews available to other members of the collaboration for completion if they are unable to complete the review within a further 12 months; and
- where authors fail to complete their review by the end of their extension, the SSU shall then make the review available to the rest of the collaboration for completion.

When the systematic review is completed there are two options for Collaborating Centres/entities wishing to publish their work:

- As a JBI systematic review the JBI process is to publish centre/entity systematic reviews (in their entirety) in the JBI Library of Systematic Reviews. In this way the systematic review is recognised as output from the centre in accordance with the Memorandum of Understanding enabling the centre to be potentially eligible for JBI funding; or
- The full review may be submitted and published in the International Journal of Evidence Based Healthcare - however it will not be recognised as output of the JBI centre and thus would be ineligible for funding by JBI. For this option protocols do not need to be submitted to the SSU for peer review. Please note: The journal is unable to publish a duplicate of the review as it appears in the library. However, the Institute does encourage the authors to submit a paper to the journal derived from and referencing the full review, which appears in the JBI Library of Systematic Reviews. Alternatively authors may choose to submit articles based on the systematic review in the JBI Library of Systematic Reviews for publication in any journal they wish.
Co-registration with Cochrane

Systematic reviews of effects conducted and published by core staff of a JBI collaborating entity will be recognised as JBI output if the following are fulfilled:

- the protocol must have been submitted (following approval by a Cochrane Review Group along with evidence of approval) to the JBI SSU; and
- the author affiliation clearly identifies the name of their Centre/Group including the words “a Collaborating/Affiliate Centre/Group of the Joanna Briggs Institute”

The above recommendations do not require any further forms to be completed or formal agreements with the Cochrane Collaboration or Cochrane Library.

Submitting reviews for publication in the JBI Library of Systematic Reviews

All systematic reviews conducted by the Joanna Briggs Institute and its collaborating entities should be published in the JBI Library of Systematic Reviews. There is facility within the library for publication of systematic reviews undertaken by authors unrelated to the Joanna Briggs Institute. These reviews are clearly marked.

All reviews appearing in the library will have had protocols peer reviewed by the Institute’s SSU prior to the conduct of the review. All completed reviews are also peer reviewed by the SSU prior to being submitted to the library. Once approved the review is published online in PDF format.

Policy on Conducting JBI-PACES Cycles

JBI seeks to translate evidence into action and its primary approach in this regards is via the JBI-PACES program. The Institute regards the audit/feedback/action/re-audit cycle as a useful and effective way of translating evidence into action.

The CFP is designed to train clinical leaders who will, in turn, conduct JBI-PACES cycles. Increasing the translation of evidence into action in the *raison d’être of the CFP*.

The JBI Approach to Evidence Utilisation

The systematic review of evidence and development of clinical guidelines pose significant challenges for health professionals in the practical setting. Evidence-based practice necessitates guideline development, education and review in order to achieve improved clinical outcomes. However, initiatives that endeavour to disseminate and implement clinical practice guidelines have often faced significant barriers and opposition, such as restricted access to information, environmental factors, professional inertia and perceived degrees of usefulness or uselessness!
The uptake of evidence into practice is often slow at best and the process can be intractably difficult for a range of complex reasons. Thus, a coordinated strategy requiring appropriate skill, determination, time, money and planning is prudent for the success of any program of implementation.

The JBI Practical Application of Clinical Evidence System (JBI PACES) is designed to meet the needs of individual health services, health units/wards and health professionals. The system consists of an online database for the collection of data on clinical activities, based on the clinical audit process; an online generic work plan (the Getting Research into Practice module) related to problem identification, action planning and action taking; an online facility to compare your results with the industry average; an opportunity to join a clinical evidence utilisation group; and an online user guide.

**Policy on Publishing Implementation Reports in the JBI Monograph Series, PACEsetterS and the International Journal of Nursing Practice**

All Clinical Fellows are required to prepare an evidence implementation report, using the template prescribed by JBI and to submit this for publication in a) the Monograph of implementation reports published by JBI; and a journal, such as PACEsetterS, International Journal of Nursing Practice or another journal.

**Policy on Establishing Evidence Synthesis Groups (ESGs)**

Evidence Synthesis Groups are self-governing, self-funding collaborators who accept the terms of the JBI Letter of Agreement. Evidence Synthesis Groups must consist of at least three members who are graduates with research training.

All members must have successfully completed a JBI Comprehensive Systematic Review Training Program and one member of the group must be named as Group Convener. Evidence Synthesis Groups conduct Systematic Reviews following the JBI approach (or, in the case of reviews and effectiveness, the approach adopted by the Cochrane Collaboration).

JBI may approve the establishment of an ESG by a suitable group, of at least three people who are graduates with research training and who have successfully completed the JBI Comprehensive Systematic Review Training Program. A Group approved by JBI is required to sign a Letter of Agreement and output is reviewed every two years. It is then able to access the resources of The Joanna Briggs Institute and to be publicly known as the, “(Name) JBI Evidence Synthesis Group”. An Evidence Synthesis Group is required to conduct no less than one Joanna Briggs Institute Systematic Review every two years.

Formal applications to become an ESG must be submitted to the JBI using the EUG application available to download from the JBI website at: http://www.joannabriggs.edu.au/esn/index.php. For any other questions contact jbi@adelaide.edu.au
Policy on Establishing Evidence Utilisation Groups (EUGs)

EUGs are made up of clinicians, quality managers or other personnel who wish to be part of a global network of people and organisations committed to clinical practice improvement. These groups are self-governing, self-funding partners who accept the terms of the Joanna Briggs Institute EUG Letter of Agreement.

Groups must consist of at least one member who is experienced in a field of health care or change management. One member must have successfully completed the JBI Clinical Fellowship program or the JBI Translating Evidence into Practice using Clinical Audit training program. One member of the group must be named as Group Convener. EUGs conduct Evidence Utilisation Projects following the JBI Practical Application of Clinical Evidence System (JBI PACES) approach.

JBI may approve the establishment of an EUG by a suitable group, which must include strong professional leadership and evidence of professional practice experience. A Group approved by JBI is required to sign a letter of agreement. The Group is then publicly known as the ‘(Name) JBI Evidence Utilisation Group’.

An Evidence Utilisation Group is required to:

- conduct no less than one Joanna Briggs Institute Utilisation Project every year that includes a minimum of two cycles; and
- publish the results of this project in either JBI PACEsetterS Magazine or The International Journal of Evidence-based Healthcare published by Wiley Blackwell (subject to blind peer review).

By becoming part of the EU Network the host organisation may also apply for JBI Endorsement. The JBI Endorsement Program provides recognition for facilities utilising the best available evidence to improve their practice and a requirement of this program is to form an EUG. For more information out JBI Endorsement visit the website at http://www.joannabriggs.edu.au

Formal applications are submitted to the JBI using the EUG application available to download from the JBI website at: http://www.joannabriggs.edu.au/eun/index.php. For any other questions contact jbi@adelaide.edu.au
Policy on Core Staff in JBI Centres
Core Centre staff may undergo the CSRTP; the CSRTP Train-the-Trainer Program; and the CFP Train-the-Trainer program at no cost. Core Centre staff are members of the research staff who have completed relevant JBI training and who contribute to the outputs of the Centre (i.e. conduct systematic reviews, are involved in node development or linguistic translation) on a regular basis. An individual may be considered core staff when the Institute has received a brief application (including CV), regardless of whether they have completed JBI training or not, as long as they have indicated their intention to complete, including dates of training to be undertaken (See Appendix 3).

Policy on Affiliate Staff in Centres
Students associated with Centres may be classified as ‘affiliates’ for the duration of their candidature. This status enables them to undertake the CSRTP free of charge and to have access to the SUMARI software as part of their academic program. This affiliate status would not continue beyond the term of their candidature and access to SUMARI would cease. An individual may be considered an Affiliate when the Institute has received a brief application (including CV), regardless of whether they have completed JBI training or not, as long as they have indicated their intention to complete, including dates of training to be undertaken (See Appendix 3).

Policy on Royalty Fees for JBI Non-Award Short Courses
Licensed JBI Trainers are required to levy a fee for all courses (except for participants who are registered as core of affiliate staff of the Centre). This fee should be set at the usual rate for programs of this kind in the Centre’s jurisdiction.

The Centres where Trainers are located are able to retain fee revenue but are required to remit a royalty payment for each participant enrolled to JBI. These royalty payments are nominal (usually 10% of the fee levied by JBI for courses offered face-to-face in Adelaide) and cover the costs of registering participants on the JBI databases and of producing and sending certificates (and, in the case of Clinical Fellows, the Fellows badge and medallion).

In 2012, the royalty payments levied on the CSRTP is AUD$150 (or AUD50 per module); and the royalty payments for the CFP is AUD$400. These royalty fees are waived for low-income countries.

Accreditation and certification (and provision of the Fellows badge and medallion) of those who complete these programs will only occur when these royalties are received by JBI.

The Institute reserves the right to vary fees if costs associated with programs increase.
Policy on Access to JBI-SUMARI

JBI-SUMARI is available at no charge to existing users; JBI staff; Core staff of JBI Centres and ESGs; and Affiliates of JBI Centres (i.e. students associated with a Centre who are required, as part of their studies, to conduct a JBI review and submit it for publication in the JBI Library of Systematic Reviews). Those who complete the CSRTP are eligible for a free JBI-SUMARI subscription for one year (dated from the completion of the CSRTP and certification by JBI).

For all new JBI staff and JBI Centre and ESG core staff users, an application must be lodged with JBI. If the status of the applicant is verified, a unique user name and password is forwarded to them.

For Centre Affiliates, an application must be lodged stating the program the student is enrolled in and the projected period of enrolment. If the status of the applicant is verified, a unique user name and password is forwarded to them - which will expire on the date the program is scheduled to end.

JBI-SUMARI is accessible to Members of JBI, as part of their membership benefits, via JBI at LWW on the Lippincott EBP Network site. JBI-SUMARI is accessible to all others via the JBI at LWW link on the Lippincott EBP Network pages at a modest cost to new, individual users who subscribe directly through Lippincott, Williams and Wilkins (LWW), a Wolters Kluwer company.

Policy on Access to JBI-PACES

JBI-PACES is available at no cost to those who are enrolled in the CFP for the six months duration of the program (dated from the day of commencement of the CFP).

JBI-PACES is accessible to Members of JBI, as part of their membership benefits.
3. The Preparation of JBI Teachers/Trainers

The 2012 Train-the-Trainers Program

Introduction

The JBI “train-the-trainer” program is designed to enable JBI Collaborating and Affiliate Centre staff and other health scientists and educators to become accredited trainers and to deliver either the JBI CSRTP or the JBI CFP. The demand for JBI training has increased and expanding training capacity by granting licenses to JBI accredited trainers assists us in meeting this demand and generates opportunities for health scientists and professionals to improve health outcomes by offering education and training in evidence based practice near to their own locality. The program also creates opportunities for Centres to generate revenue; to raise their profile locally; and to build partnerships in their jurisdiction.

In licensing Trainers, the Institute permits Centres to trade on JBI’s well-established brand and to offer programs that represent considerable investment by JBI. As such, the Institute is required to ensure that the courses taught on its behalf meet the standards associated with our brand; that JBI Trainers have sufficient knowledge, understanding and skill to facilitate learning; and that the JBI brand is neither unacknowledged nor brought into disrepute.

Until 2012 the Train-the-Trainer programs for both the CSRTP and the CFP were relatively informal, based on action learning and the use of learning sets. With the transfer of JBI to the University sector and the increased attention on the protection of intellectual property, JBI was required to adopt a new, more rigorous approach to the preparation and licensing of Trainers in 2012.
CSRTP Trainers

All CSRTP Trainers are encouraged (though not required) to become Clinical or Affiliate titleholders of the University of Adelaide. The CSRTP Train-the-Trainer program is a four-day, face-to-face program (Part 2), preceded by a 50-hour pre-course online learning program and an online pre-course assessment (Part 1) that must be completed satisfactorily no later than two weeks before commencement of the program. The pre-course program focuses on the content and processes of Modules 1, 3, 4 and 5 of the CSRTP and will change in line with any methodological modification to the CSRTP itself. The online pre-course assessment seeks to establish that the participant has a sound understanding of the content and teaching and learning processes of the CSRTP. Attendance at the four-day program is limited to those who successfully complete the pre-course program and the online pre-course assessment. Only core-staff of Centres are eligible for free of charge enrolment in the program.

All CSRTP Trainers are provided with a full package of hard-copy Training materials and these materials are updated and mailed to Trainers annually. Part 2 of the CSRTP Train-the-Trainer program consists entirely of assessed microteaching activities. During the program, participants are required to satisfactorily deliver one full session from four modules of the CSRTP program without prior notice of the topic. The Train-the-Trainer program is facilitated by the Executive Director, Program Directors and staff from the Synthesis Science Unit. The Executive Director is required to verify that, in his opinion and based on the performance of the Trainer during the four-day, Part 2 Train-the-Trainer program, the trainer is sufficiently knowledgeable and skilled to deliver the program.

CFP

All CFP are encouraged (though not required) to become Clinical or Affiliate titleholders of the University of Adelaide. The CFP Train-the-Trainer program is a four-day face-to-face program (Part 2), preceded by a 50-hour pre-course program and an online pre-course assessment (Part 1) that must be completed satisfactorily no later than two weeks before commencement of the program. The pre-course program focuses on the content and processes of the CFP and the online pre-course assessment seeks to establish that the participant has a sound understanding of the content and teaching and learning processes of the CFP. Attendance at the four-day program is limited to those who successfully complete the pre-course program and the online pre-course assessment. Only core-staff of Centres are eligible for free of charge enrolment in the program.
The CF Train-the-Trainer program consists of assessed microteaching activities and observation of the one-day clinical leadership workshop (delivered by JBI’s partner, Proteus Leadership Centres). During the program, participants are required to satisfactorily deliver two full sessions from the CF program without prior notice of the topic and to develop an evidence summary and associated audit criteria. The Train-the-Trainer program is facilitated by the Executive Director, Program Directors and staff from the Translation Science Unit. The Executive Director is required to verify that, in his opinion, the trainer is sufficiently knowledgeable and skilled to deliver the program.

**Mandatory Continuing Professional Development of JBI Teachers/Trainers**

**CSRTP**

Trainers are required to demonstrate their continued development in training systematic reviewers by:

- Conducting a CSRTP at least once per year;
- Having at least one completed systematic review published in the JBI Library of Systematic Reviews by a participant in a CSRTP conducted by the Trainer every two years;
- Participating in a teleconferenced meeting of Trainers every year;
- Being an author of a systematic review published in the JBI Library of systematic reviews every two years;
- Submitting an annual training report and annual CE report to the Institute (using form in Appendices 4 and 5); and
- Successfully completing the Trainers accreditation knowledge assessment every two years.

These requirements are considered to be essential to maintain and improve the quality of systematic review training and to increase the production of high quality systematic reviews.
CFP
As from 2012, CFP Trainers will be required to demonstrate their continued development in training clinical leaders by:

- Conducting a CFP at least once per calendar year;
- Having all final reports from those who complete the CFP published (or accepted for publication) in both the JBI Monograph and PACEsetterS or the International Journal of Nursing Practice or another journal;
- Participating in a teleconferenced meeting of Trainers every year;
- Being an co-author of a JBI-PACES implementation project published in PACEsetterS or any other journal every two years;
- Submitting an annual training report to the Institute; and
- Successfully completing the Trainers accreditation knowledge assessment every two years.

JBI Trainers Annual Meeting
A teleconferenced meeting of Trainers will be convened twice per year. At each meeting, updates on the CSRTP, the CFP, the JBI-SUMARI software; and the JBI-PACES software will be presented. Each Trainer attending will be invited to report on their activities and raise any issues that require resolution. Trainers will be required to attend at least one of these meetings per year.

JBI Trainers Website/IntraNet
A password protected JBI Trainers website/IntraNet is provided for Trainers, where they can access training materials and a bulletin board.
4. Conducting the CSRTP

Announcing and Promoting a CSRTP

Trainers are encouraged to plan ahead when contemplating the conduct of a CSRTP and to promote it both within their jurisdiction and on the JBI website. Potential participants frequently contact the Institute about the CSRTP in locations other than Adelaide and ensuring that we know about your plans may increase enrolments in your course.

Accredited JBI Trainers are at liberty to set their own program fees – however, a royalty fee of AUS$50.00 per module per participant is charged by JBI (payable no later than two weeks after completion of the program) if the Trainer copies the training materials themselves; or AUS$100.00 per module per participant if JBI is asked to provide training materials.

As a guide, Training Programs offered at JBI Headquarters in 2012 cost AUD$300.00 for the one-day, Module 1 and AUD$600.00 for the two-day modules – that is, AUD$2,700.00 for the full eight-day program. **MOST TRAINERS OFFER A FIVE-DAY, THREE-MODULE PROGRAM RATHER THAN THE EIGHT-DAY PROGRAM (full cost up to AUD$1,500).**

It is essential to have access to a networked computer for each participant; access to a data projector; access to a library and a librarian; and sufficient space to facilitate small group work.

It is also important to seek your IT staff’s assistance to pre-install the JBI – Comprehensive Review Management System (JBI – CReMS) on the computers to be used.

Registering Participants

To use the JBI software, each participant needs to be provided with a temporary user name and password. For this to occur, Trainers need to provide a list of participants and their Email addresses to JBI **FOUR WEEKS** prior to the conduct of the workshop. The pro-forma to be used is in Appendix 6.

Core staff of Collaborating Centres are eligible to attend training programs at no cost **(PLEASE NOTE – TRAINERS PROVIDING TRAINING TO CORE STAFF MUST COPY TRAINING MATERIALS AND NOT REQUEST THEM FROM JBI);** for other attendees a royalty fee of AUD$50.00 per module per participant is charged by JBI (payable no later than two weeks after completion of the program) if the Trainer copies the training materials themselves; or AUD$100.00 module per participant if JBI is asked to provide training materials. **Entering participants who successfully complete the program on the JBI database of Accredited Reviewers and the issuing of a Certificate of Completion does not occur until these royalty fees are received by JBI.**
Registering Completions

When a Trainer verifies with JBI (using the proforma provided in Appendix 7) that a participant has attended ALL of the sessions related to specific modules, JBI will enter the participant’s details on the Accredited Reviewers database and post a Certificate of Completion to the Trainer. **It is essential for trainers to ensure that attendance at all relevant sessions has occurred.** If JBI is to maintain consistency across reviewers, it is essential to ensure that only individuals who have attended all sessions, and who have completed a draft protocol and presented it to the group are accredited as reviewers.

The CSRTIP Course Materials

**Power Points**

Standardised power points, using the JBI template, are provided in electronic format to Trainers. The format of the power point slides may not be altered and the JBI branding on them may not be removed. Trainers may add additional branding; and may add additional slides; but they may not remove any slides or remove or alter the JBI logos or change the template. The power point slides, as part of the CSRTIP training materials, are subjected to both internal review and external peer review annually and are not changed except following annual review in June of each year. Following the annual review process, “old” power point slides are removed from the Trainers website and replaced with the new set. Trainers are notified when this occurs.

**Study Guide**

A standardised Study Guide, using the JBI template, is provided in electronic format to Trainers. The format of the Study Guide may not be altered and the JBI branding on them may not be removed. Trainers may add additional branding but they may not remove any content or remove or alter the JBI logos or change the template. The Study Guide, as part of the CSRTIP training materials, is subjected to both internal review and external peer review annually and is not changed except following annual review in June of each year. Following the annual review process, the “old” Study Guide is removed from the Trainers website and replaced. Trainers are notified when this occurs. Trainers may provide additional materials to localise or contextualise the course.
Workbook
A standardised Workbook, using the JBI template, is provided in electronic format to Trainers. The format of the Workbook may not be altered and the JBI branding on them may not be removed. Trainers must ensure that all of the activities in the workbook are completed satisfactorily. Trainers may add additional branding but they may not remove any content or remove or alter the JBI logos or change the template. The Workbook, as part of the CSRTP training materials, is subjected to both internal review and external peer review annually is not changed except following annual review in June of each year. Following the annual review process, the “old” Workbook is removed from the Trainers website and replaced. Trainers are notified when this occurs. Trainers may provide additional materials to localise or contextualise the course.

JBI Reviewers Manual
The JBI Reviewers Manual is available in electronic format at no cost to Trainers. Hard copies can be purchased through the on-line “shop” on the JBI website.

JBI-SUMARI User Guide
The JBI-SUMARI User Guide is available in electronic format at no cost to Trainers. Hard copies can be purchased through the on-line “shop” on the JBI website.

JBI/Lippincott Synthesis Science Book Series
It is highly desirable that Trainers have access to this collection; and that they are recommended as essential reading to CSRTP participants. They are available as e-books from Lippincott, Williams and Wilkins at:

http://www.nursingcenter.com/evidencebasedpracticenetwork/Home/JBI@LWW/JBI-Online-Books.aspx; and, in hard copy, through the on-line “store” on the JBI website.

Readings
All of the prescribed readings are provided to Trainers in electronic format. Note that JBI fulfils the copyright obligations. Trainers may wish to substitute other papers for the appraisal and extraction sections of the program to contextualise the exercises; if this does occur, Trainers will need to follow the copyright procedures that apply to copying and distributing published material in their jurisdiction.
Thumb-Drives/USB Drives/CDs
Because of the extensive materials provided to participants, it is preferable to provide the manuals and readings in electronic format on a USB drive or CD. Loading these materials can be carried out locally by Trainers. JBI branded, pre-loaded USB drives can be ordered from JBI at AUD$25 each including postage.

Accessing JBI-SUMARI

For the Training Period
Trainers are provided with user names and passwords for all participants when they register them. The name and email address of each participant is required for this to occur.

Activating the Complimentary 1 Year Subscription for Participants
The complimentary one year subscription for participants will be confirmed when the Trainer submits a notification of completion. Should completion not be verified, access to JBI-SUMARI will be cancelled.
Announcing and Promoting the CFP

Trainers are encouraged to plan ahead when contemplating the conduct of a CFP and to promote it both within their jurisdiction and on the JBI website. Potential participants frequently contact the Institute about the CFP in locations other than Adelaide and ensuring that we know about your plans may increase enrolments in your course.

Accredited JBI Trainers are at liberty to set their own program fees – however, a royalty fee of AUD $400.00 per participant is charged by JBI (payable no later than two weeks after commencement of the program) if the Trainer copies the training materials themselves; or AUS$450.00 per participant if JBI is asked to provide training materials.

As a guide, the CFP offered at JBI Headquarters in 2012 costs AUD $2,200.00 per participant.

It is essential to have access to a networked computer for each participant; access to a data projector; access to a library and a librarian; and sufficient space to facilitate small group work.

Registering Participants

To use the JBI software, each participant needs to be provided with a temporary user name and password. For this to occur, you will need to provide a list of participants and their Email addresses to JBI FOUR WEEKS prior to the conduct of the workshop. A pro-forma to be used is in Appendix 6.

Entering participants who successfully complete the program on the JBI database of Clinical Fellows; their names on the Clinical Fellows Honour Board; the issuing of a Certificate of Completion; and membership of the JBI Fellows Alumni does not occur if these royalty fees are not received by JBI.
Registering Completions

When a Trainer verifies with JBI (using the proforma provided in Appendix 7) that a participant has attended ALL of the days related to the CFP, JBI will enter the participant’s details on the Fellows database and post a Certificate of Completion and the Clinical Fellows badge to the Trainer (Note: the Clinical Fellow Medallion is presented in person on attendance by the Fellow at the annual Fellows Assembly; medallions are not posted on to Trainers or Fellows).

**It is essential for trainers to ensure that attendance at all relevant sessions and days has occurred; that the implementation report has been completed; and that a report – in the prescribed format – has been submitted to JBI for publication in the Clinical Fellows Monograph.**

The CFP Course Materials

**Power Points**

Standardised power points, using the JBI template, are provided in electronic format to Trainers. The format of the power point slides may not be altered and the JBI branding on them may not be removed. Trainers may add additional branding; and may add additional slides; but they may not remove any slides or remove or alter the JBI logos or change the template. The power point slides, as part of the CFP training materials, are subjected to both internal review and external peer review annually and are not changed except following annual review in June of each year. Following the annual review process, “old” power point slides are removed from the Trainers website and replaced with the new set. Trainers are notified when this occurs.

**Study Guide**

A standardised Study Guide, using the JBI template, is provided in electronic format to Trainers. The format of the Study Guide may not be altered and the JBI branding on them may not be removed. Trainers may add additional branding but they may not remove any content or remove or alter the JBI logos or change the template. The Study Guide, as part of the CFP training materials, is subjected to both internal review and external peer review annually and is not changed except following annual review in June of each year. Following the annual review process, the “old” Study Guide is removed from the Trainers website and replaced. Trainers are notified when this occurs. Trainers may provide additional materials to localise or contextualise the course.
Workbook
A standardised Workbook, using the JBI template, is provided in electronic format to Trainers. The format of the Workbook may not be altered and the JBI branding on them may not be removed. Trainers must ensure that all of the activities in the workbook are completed satisfactorily. Trainers may add additional branding but they may not remove any content or remove or alter the JBI logos or change the template. The Workbook, as part of the CFP training materials, is subjected to both internal review and external peer review annually and is not changed except following annual review in June of each year.

Following the annual review process, the “old” Workbook is removed from the Trainers website and replaced. Trainers are notified when this occurs. Trainers may provide additional materials to localise or contextualise the course.

JBI-PACES User Guide
The JBI-PACES User Guide is available in electronic format at no cost to Trainers. Hard copies can be purchased through the on-line “shop” on the JBI website.

Readings
All of the prescribed readings are provided to Trainers in electronic format. Note that JBI fulfils the copyright obligations. Trainers may wish to substitute other papers for the appraisal and extraction sections of the program to contextualise the exercises; if this does occur, Trainers will need to follow the copyright procedures that apply to copying and distributing published material in their jurisdiction.

Thumb-Drives/USB Drives/CDs
Because of the extensive materials provided to participants, it is preferable to provide the manuals and readings in electronic format on a USB drive or CD. Loading these materials can be carried out locally by Trainers. JBI branded, pre-loaded USB drives can be ordered from JBI at AUD$25 each including postage.
Other Online Materials Available to support the Program

An online JBI-PACES training program offered by Frontline Care Solutions and an online EBP course offered by Sigma Theta Tau International (STTI) are available via the JBI Global Learning Centre. Trainers may wish to utilise these resources to supplement the face to face content. Note, however, that both of these courses, though written by JBI staff, are offered by third parties and require the payment of a fee to those third parties; these costs are additional to the JBI fee levy and are payable directly to the third party providers. For more information go to: www. http://globallearningcentre.joannabriggs.edu.au/

Accessing JBI-PACES

For the Training Period
Trainers are provided with user names and passwords for all participants when they register them. The name and email address of each participant is required for this to occur.
Appendix 1: Trainers Agreement

TRAIN THE TRAINER AGREEMENT

THIS AGREEMENT is made this ....................day of ......................2012
BETWEEN:
Adelaide Research & Innovation Pty Ltd as trustee of the Adelaide Research & Innovation Investment Trust
ABN 80 098 579 684 (“ARI”) of Level 7, 115 Grenfell Street ADELAIDE SA 5000;
and
[name of Collaborating Centre] (“Collaborating Centre”) of [insert address of entity];
and
The person whose name and address is set out in item 1 of schedule 1 (“the Trainer”).

BACKGROUND

A. ARI is the wholly owned commercial development company of the University of Adelaide (“the University”) and is authorised to contract the services of the University’s researchers and associated businesses.

B. The Joanna Briggs Institute (“JBI”) is a unit of the University and its purpose is to research and publish information regarding the systematic review of health care practices.

C. The Collaborating/Affiliate Centre wishes to have the Trainer deliver the JBI Comprehensive Systematic Review Training Program (CSRTP) as specified in Schedule 2. (“the Training”)

D. The parties have agreed that the Collaborating Centre and the Trainer will collaborate with JBI, through ARI, to deliver the Training in accordance with the terms and conditions of this Agreement.
**THE PARTIES AGREE AS FOLLOWS**

**1. Preliminary**

1.1 In this agreement, the following words have the meanings assigned to them as follows:

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborating/Affiliate Centre</td>
<td>a centre representing an institution that has entered into an agreement with ARI to collaborate with JBI, through ARI, for the purpose of research and publishing of systematic reviews of health care practices, and as further specified at Item 1 of Schedule 1.</td>
</tr>
<tr>
<td>Course/program</td>
<td>courses/programs the trainer is licensed to deliver as detailed in Schedule 2 of this agreement</td>
</tr>
</tbody>
</table>
| Confidential Information         | means all information held by a Party, in any forms or media, including, without limitation, trade secrets, know-how, information, research protocols and methodology, processes, techniques, software, computer records, designs, plans, drawings and models, but does not include:  
  (a) information which is publicly available at the date of this Agreement;  
  (b) information which subsequently becomes publicly available, other than as a result of breach of this Agreement by the recipient or disclosure by any other person contrary to this Agreement.  
  (c) information which is already known to the recipient at the date of this Agreement; or  
  (d) information which the recipient has acquired or come to know after the date of this Agreement:  
    (i) independently of the disclosing Party or any agent or employee of the disclosing Party;  
    and  
    (ii) otherwise than pursuant to this Agreement. |
| Executive Director               | the executive director of JBI                                                                                                               |
| Intellectual Property Rights     | means patents, trademarks, service marks, registered designs, copyrights, database rights, design rights, confidential information, applications for any of the above, and any similar right recognised from time to time in any jurisdiction, together with all rights of action in relation to the infringement of any of the above. |
| Start date                       | the date specified at Item 3 of Schedule 1                                                                                                  |
| Term                             | the term of this Agreement set out in Item 5 and includes any extension under clause 2.2                                                   |
| Trainer                          | A person employed by the Collaborating Centre, who having completed the prescribed JBI train-the-trainer program, is licensed by JBI, through ARI, to deliver the Training on behalf of JBI and as further named at Item 2 of Schedule 1. |
| Training Activities              | As detailed in Schedule 3 of this Agreement                                                                                                 |
Appendix 1: Trainers Agreement (Cont.)

1.2 In this Agreement, unless the context otherwise requires:
   a) the singular includes the plural and conversely;
   b) words importing gender will include all genders;
   c) the expression ‘person’ will include individuals, corporations, partnerships, joint ventures, associations, trusts, agencies or other bodies; and
   (d) where a word or phrase is given a defined meaning in this Agreement, any other part of speech or other grammatical form of that word or phrase has a corresponding meaning.

2. Term

2.1 This Agreement commences on the Start Date and, unless terminated earlier in accordance with clause 8, operates for the Term.

2.2 The Term may be extended for any period as agreed between the Parties in writing.

3. Confidential Information

3.1 Each Party will retain all right, title and interest in and to its Confidential Information and shall disclose to the other Party such of its Confidential Information as it considers necessary for the purpose of the Collaboration.

3.2 A Party shall notify the other Party of any restrictions or limitations on use of the Confidential Information of which it is aware. Where such notification has been made, the other Party may only use the Confidential Information in accordance with those restrictions or limitations.

3.3 The recipient of any Confidential Information agrees to keep the Confidential Information secret and confidential at all times and must not, without the prior written approval of the disclosing Party, use, disclose, divulge or deal with any Confidential Information, nor cause, permit or allow any act, matter or thing to be done, omitted or occur whereby any Confidential Information may become known or be used by, or be disclosed or communicated to, any other person, except strictly in accordance with the terms of this Agreement.

4. Obligations of the Collaborating Centre and the Trainer

4.1 The Collaborating Centre must be liable for all costs in connection with the delivery of the Training.

4.2 The Trainer must:
   (a) establish a training schedule within a month after the Start Date;
   (b) deliver only the Training as specified in Schedule 2;
   (c) deliver the Training according to the activities detailed in Schedule 3;
   (e) per annum, attend at least one teleconference meeting with other trainers engaged by ARI, on behalf of JBI; and
   (f) meet the commitments required in Schedules 2 and 3;

4.3 The Collaborating Centre will provide ARI, on behalf JBI, with information in relation to the Training delivered by the Trainer including details of attendees, how the courses/programs were conducted, the methods used and the results.

5. Obligations of ARI

5.1 JBI, through ARI, will provide the Trainer with training materials to enable the Trainer to deliver JBI programs/courses as set out in Schedule 2 (“JBI Training Materials”)

6. Intellectual Property

6.1 Each party retains ownership to Intellectual Property Rights it has created prior to the Start Date or independently of this Agreement and which it has made available for the performance of this Agreement.
Appendix 1: Trainers Agreement (Cont.)

6.3 ARI grants the Collaborating Centre a revocable, non-exclusive licence solely for the Trainer to use the copyright in the JBI Training Materials as specified at Schedules 2 and 3, for the sole purpose of the participants attending the Training session and for those participants’ subsequent learning purposes, but not for use in tertiary, higher education, post graduate, fee paying or award courses. The Collaborating Centre and the Trainer may only use, photocopy or distribute the JBI Training Materials for the purpose of providing the JBI Training Materials to the attending participants. The Collaborating Centre and the Trainer will respect the moral rights of the authors in the JBI Training Materials.

6.4 In the event that the Collaborating Centre or the Trainer wish to incorporate the JBI Training Materials in the programs they deliver for the purpose of tertiary, higher education, post graduate, fee paying or award courses, the Collaborating Centre will enter into good faith negotiations with ARI to obtain a licence to the JBI Training Materials.

6.5 The Trainer and the Collaborating Centre grant ARI, on behalf of JBI, a perpetual, non-exclusive licence to use, copy and publish information provided under clause 4.3.

6.6 Each Party will, in any publication containing information provided by the other Party, acknowledge the authorship of that information.

7. Payment

7.1 The Collaborating Centre will pay ARI, on behalf of JBI, a royalty fee as set out in Schedule 4 ("Royalty Fee").

7.2 The Collaborating Centre may set and receive fees additional to the Royalty Fee from the participants attending the Training they deliver, and retain the additional revenue generated.

7.3 The Collaborating Centre must keep and maintain proper accounting records of all the Training including revenue generated and if requested by ARI, at any time during or for 7 years after the Term, the Trainer will provide copies of such records to ARI’s employees or advisers.

8. Publicity and promotion

8.1 The Collaboring Centre and the Trainer will use reasonable endeavours to promote JBI within their spheres of influence, including, without limitation, the promotion of membership of JBI.

8.2 ARI grants the Collaboring Centre and the Trainer a non-exclusive, revocable, royalty-free licence, for the Term of this Agreement, to use the Intellectual Property Rights in the JBI™ name and logo for the sole purpose of promoting the Training and JBI.

8.3 ARI will provide the Trainer with sufficient quantities of its promotional material to enable the Trainer to promote JBI.

8.4 In the event that ARI considers that the JBI logo has been used outside the restrictions of clause 6.2, ARI will terminate this licence with immediate effect, by giving written notice to the Trainer and the Collaborating Centre.

8.5 The Trainer and the Collaborating Centre will be solely responsible for and will ensure that all communications conducted by it, in connection with this Agreement and particularly JBI, will not contain information that is inaccurate or incomplete, false, misleading or deceptive.

8.6 In the event that ARI considers that the Trainer or the Collaborating Centre has breached this clause 8, ARI may terminate the Agreement pursuant to clause 10.2.

9. Liability

The Collaborating Centre will indemnify ARI from and against any loss (including reasonable legal costs and expenses) or liability (but specifically excluding any loss of profit and indirect or consequential loss damage or injury) reasonably incurred or suffered by ARI arising from any claims, demands, actions or proceedings by a third party against the Collaborating Centre arising out of a breach of the terms of this Agreement or the negligent act or omission of the the Collaborating Centre or its officers, employees and agents or the Trainer, provided that such indemnity will be reduced proportionately to the extent that any negligent act or omission or breach of the terms of this Agreement of ARI or its officers, employees and agents contributed to the relevant loss or liability.
10. Termination

10.1 Either Party may terminate this Agreement by not less than 3 months written notice to the other Party.

10.2 If the Trainer breaches this Agreement and ARI considers that the breach cannot be remedied, then ARI will terminate this Agreement immediately.

10.3 This Agreement will terminate immediately, if the Trainer leaves the Collaborating Centre’s employment.

10.4 The consequences of the expiry or termination of this Agreement are:

(a) the immediate termination of the licence for the Collaborating Centre and Trainer to use the JBI Training Materials;

(b) the immediate withdrawal of the JBI Training Materials and their immediate return to ARI; and

(c) the immediate withdrawal of all JBI promotional material;

10.5 All rights and obligations under Clauses 3, 6, 9, 10.5, 11 and 16 will survive termination of this Agreement to the extent necessary to give effect to the rights provided therein.

11. Dispute Resolution

11.1 Any dispute controversy or claim arising out of or relating to this Agreement or the breach termination or invalidity thereof shall in the first instance be referred to the following representatives of the Parties for them to endeavour to resolve amongst themselves:

ARI: Managing Director or his representative

Trainer: Managing Director of the Collaborating Centre

11.2 In the event that the dispute controversy or claim is not resolved within 30 days from the date of referral of the dispute to the designated persons referred to in clause 11.1 (or within such further period as those representatives may agree is appropriate) the dispute controversy or claim shall be referred to conciliation administered by the Australian Commercial Disputes Centre Limited conducted at Adelaide and held in accordance with the Conciliation Rules of the Centre in force at the date of this Agreement.

12. Severability

Should any provision of this Agreement be held by a court to be invalid, unenforceable or illegal for any reason, such provision shall be deemed severed from the Agreement and the validity and enforceability of the remaining provisions shall not be thereby affected.

13. Entire Agreement

This Agreement constitutes the entire agreement between the Parties and supersedes all prior representations, agreements, statements and understandings, whether oral or in writing.

14. Assignment

This Agreement is personal to the Parties and neither Party may assign its benefits or obligations under this Agreement unless mutually agreed.

15. General

15.1 The Trainer must not transfer or encumber its interest in, or subcontract its obligations under, this Agreement without ARI’s written consent.

15.2 The relationship between the parties is that of independent contractors and not partners, joint venturers or principal and agent.

15.3 Nothing in this Agreement prevents ARI from entering into any future arrangements with any third Party in relation to any matter similar to or in competition with the subject matter of this Agreement.
Appendix 1: Trainers Agreement (Cont.)

15.4 The parties intend to sign and deliver this Agreement by electronic or facsimile transmission. Each party agrees that the delivery of the Agreement by electronic or facsimile transmission shall have the same force and effect as delivery of original signatures and that each party may use such electronic or facsimile signatures as evidence of the execution and delivery of the Agreement by all parties to the same extent that an original signature could be used.

16. Governing Law

This Agreement will be governed by the laws of the State of South Australia and all applicable laws of the Commonwealth of Australia. The Parties submit to the jurisdiction of the courts of South Australia.

EXECUTED as an Agreement

SIGNED for and on behalf of Adelaide Research & Innovation Pty Ltd by an officer duly authorised to sign on its behalf in the presence of:

..............................................
Name: ..............................................
Position: ..............................................

Witness Name: ..............................................
Position: ..............................................

SIGNED for and on behalf of [insert name of Collaborating Centre] by an officer duly authorised to sign on its behalf in the presence of:

..............................................
Name: ..............................................
Position: ..............................................

Witness Name: ..............................................
Position: ..............................................

SIGNED for and on behalf of the TRAINER in the presence of:

..............................................
Name: ..............................................
Position: ..............................................
Appendix 1: Trainers Agreement (Cont.)

**SCHEDULE 1**

**Item 1:** Name of Collaborating Centre

**Item 2:** Name and Address of Trainer  
*INSERT NAME AND ADDRESS OF TRAINER.*

**Item 3**  
[insert date]

**Item 4**  
[insert date]

**Item 5**  
[insert term]

**SCHEDULE 2**

**Item 1: Courses/programs the Trainer is licensed to deliver**  
*INSERT NAME(S) OF COURSE/PROGRAM  
(E.G. Comprehensive Systematic Review Training Program;  
Clinical Fellowship Program)*

**SCHEDULE 3**

**Item 1: Training Activities**

Refer to the Train the Trainer Handbook

**SCHEDULE 4**

**Item 1: Royalty Fees**  
*INSERT NAME(S) OF COURSE/PROGRAM AND ROYALTY FEE PAYABLE (e.g.  
Comprehensive Systematic Review Training Program  
Module 1 AUD$50;  
Module 2 AUD$50 etc;  
Clinical Fellowship Program AUD $400)*
Appendix 2: University of Adelaide Title Holder Application Form

TITLE
CONFERRAL OF TITLE REQUEST FORM

PLEASE COMPLETE AND FORWARD TO: HEAD OF SCHOOL/BRANCH

This form is to be used to request the conferral of an honorary academic or non-academic title. Please refer to the guidelines at http://www.adelaide.edu.au/hr/policies/apptTitles/

STAFF MEMBER DETAILS (PLEASE USE BLOCK CAPITALS)

Staff ID: _____________________ School/Branch: ________________________________ Work phone: __________________

Title: ___________________________ Family name: ______________________________ Given names (in full): _____________________________

Email: ___________________________ Preferred Name: ___________________________

Date of birth: _____________________ □ Male □ Female Citizenship: __________________________

Home/Postal address: ____________________________________________________________

City: ___________________________ State: ___________________________ Postcode: __________

Place of current employment: _____________________________________________________

Position held: _________________________________________________________________

Employment address: ____________________________________________________________

City: ___________________________ State: ___________________________ Postcode: __________

TITLE REQUESTED

School/Branch in which it is proposed the title will be held: ____________________________

Period of title from (maximum period of 3 years) ___________________________ to: 

Title Sought □ Clinical □ Affiliate □ Adjunct □ Visiting □ Field

Level Sought □ Professor* □ Associate Professor □ Senior Lecturer □ Lecturer □ Associate
□ Associate Lecturer □ Research Fellow □ Fellow □ Associate

* If this title is to be awarded as a Professor please advise the nominated committee

(Refer to Clause 1.1 of the Guidelines at http://www.adelaide.edu.au/hr/policies/apptTitles/)

AUTHORISATION

☐ As required, I have attached a current curriculum vitae which includes qualifications, recent relevant teaching and/or research experience (last five to 10 years), and a list of publications (if applicable).

I have read the University’s Policy for Conferring Honorary Roles and, should my application be successful, I certify that when undertaking work on behalf of the University: (a) I will comply with University policies or codes of practice (b) I will not use the intellectual property, including copyright, of any third party in the work I undertake. Further, I understand that if appointed as a title holder I will not have the authority to bind the University to any agreement, contract or other legally binding instrument.

Applicant’s signature: _____________________________________________ Date: ______________________

Please retain a copy for your records
Appendix 3: Core and Affiliate Centre Staff – Application Form

Core staff Application Form
Name: ________________________________________________________________
Qualifications: __________________________________________________________
Term of employment: ____________________________________________________
Date of JBI training (either completed or intended): _________________________
Contribution to the Centre:

- Systematic Review
- Node development
- Linguistic translation

Centre Affiliates Application Form
Name: ________________________________________________________________
Course/ Program: _______________________________________________________
Period of candidature: ________________________________________________
Due date for completion: ______________________________________________
Contribution to the Centre:

- Systematic Review
Appendix 4: Annual Report Form

JBI Trainer: Annual Training Report

JBI Collaborating Centre/Entity:

Location of training program:

Name of Trainer:

Date of submitting report:

<table>
<thead>
<tr>
<th>Date of Conducting Course</th>
<th>Name(s) of Co-Trainers Involved</th>
<th>CSRTP: Number of Completions</th>
<th>CFP: Number of Completions</th>
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Signature of Trainer:

Date:

Comprehensive Systematic Review
Appendix 5: Trainers Annual CPE Form

JBI Trainer: Annual CSRTP/CF CPE Report

JBI Collaborating Centre/Entity:

________________________________________________________________________

Name of Trainer:

________________________________________________________________________

Date of submitting report:

________________________________________________________________________

On what date did you complete your initial Train-the-Trainer program?

How many CSRTP/CFP have you conducted since your initial Train-the-Trainer program?

Have you submitted an annual training report showing the CSRTP/CFP programs you have conducted?

Have you participated in teleconference meeting of Trainers in the last two years? List the dates of the meetings you participated in:

Have you successfully completed the Trainers accreditation knowledge assessment in the last two years?

Signature of Trainer:

________________________________________________________________________

Date:

________________________________________________________________________
Appendix 6: Registration of Participants Forms

**JBI Training Program Participant Registration: CSRTP**

Please ensure all participants are registered 4 weeks prior to program commencement to ensure password access to JBI software.

JBI Collaborating Centre/Entity providing training program:

________________________________________________________________________

Location of training program:

________________________________________________________________________

Date:

________________________________________________________________________

Name(s) of Licensed JBI Trainers:

________________________________________________________________________

<table>
<thead>
<tr>
<th>Participant</th>
<th>Organisation</th>
<th>Email address</th>
<th>Modules attending</th>
<th>Training materials required from JBI</th>
<th>Fee payable to JBI</th>
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<td>1 2 3 4 5</td>
<td>Yes ($100.00ppp; No: $50.00ppp) Per module</td>
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Total payable to JBI
Appendix 6: Registration of Participants Forms (Cont.)

JBI Training Program Participant Registration: CFP

Please ensure all participants are registered 4 weeks prior to program commencement to ensure password access to JBI software.

JBI Collaborating Centre/Entity providing training program:

________________________________________________________________________

Location of training program:

________________________________________________________________________

Dates:

________________________________________________________________________

Name(s) of Licensed JBI Trainers:

________________________________________________________________________

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<th>Participant Name</th>
<th>Organisation</th>
<th>Email address</th>
<th>Training materials required from JBI</th>
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<td>Per module</td>
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<th>Fee payable to JBI</th>
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</table>

Total payable to JBI
Appendix 7: Registration of Completions Forms

Comprehensive Systematic Review Training Program

Notification of successful completion and request for certificate

Please ensure all successful participants are registered as soon as possible to facilitate the entry of the JBI database of Accredited Reviewers and their access to complimentary user licenses to the JBI software.

JBI Collaborating Centre/Entity providing training program:

__________________________

Location of training program:

__________________________

Dates

__________________________

Name(s) of Licensed JBI Trainers:

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<thead>
<tr>
<th>Participant Name</th>
<th>Organisation</th>
<th>Email address</th>
<th>Modules attended</th>
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## Clinical Fellowship Training Program

Notification of successful completion and request for certificate

Please ensure all successful participants are registered as soon as possible facilitate their entry into the JBI database of Clinical Fellows.

**JBI Collaborating Centre/Entity providing training program:**

__________________________

**Location of training program:**

__________________________

**Dates:**

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**Name(s) of Licensed JBI Trainers:**

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