**CLINICAL RESEARCH WELCOME CHECKLIST**

**Instructions:** Before you get started, it is important to know the research duties that you will be performing. Discuss with your Principal Investigator (PI) and/or Manager regarding all clinical-related activities you may be performing within your role, as they will determine the trainings, immunizations, and additional requirements that you will need.

1. **Complete Your Research Employee Profile.**

To begin the training pathway for your role, please complete your research employee profile form using this link <https://is.gd/eCREST>.

1. **Complete Emory University New Employee Welcome Session**

Emory’s [New Employee Welcome Session](https://www.hr.emory.edu/eu/career/new-hires/welcome-session.html) is to gain a better understanding of Emory's mission and culture, as well as the benefits, programs and resources that are available to you. You will be given the opportunity to register as part of your onboarding tasks. Departments and/or Managers may have *additional* orientation requirements (i.e., observing/shadowing, monitoring,reviewing SOPs, etc.)

1. **Complete** **Immunization Requirements**

* Tuberculosis Antibody Testing (T-Spot, PPD)
* Hepatitis B and Hepatitis B Antibody Testing \*
* Measles, Mumps, Rubella
* Varicella (Or Proof of Immunity)
* Flu\* (If hired between October and March)
* COVID-19\*

\**Option to submit waiver*

If you meet one or more of the following criteria:

* Work directly with human subjects (i.e., Escorting, Phlebotomy, Vitals, ECG)
* Any human subject interaction more than a handshake
* Handling human samples (i.e., Collecting, Transporting, Shipping, Processing, etc.)

There are certain **immunizations and antibody screenings** that are required for Emory Healthcare research credentialing verification.

You may schedule an appointment with Employee Health through the [HOME](https://www.hr.emory.edu/eu/wellness/general-health/occupational-injury-management/home-employee-health-portal.html) website if you need to schedule any vaccinations or antibody testing. Alternatively, you may obtain vaccinations from your preferred healthcare provider.

1. **Complete Baseline Trainings**

The Collaborative IRB Training Initiative Program (CITI) is a leading online training program maintained by the University of Miami. It offers curricula in human subject research, animal research, and the responsible conduct of research. All *Emory personnel* conducting "human subject research" activities at Emory must take CITI.

This includes anyone working with identifiable data or biological specimens for research purposes. This includes all roles: investigators, research nurses, coordinators, students, technicians, data collectors, and faculty advisors.

[Click here](https://irb.emory.edu/resources/training/courses.html) for information and CITI registration instructions and complete the following courses are:

1. Biomedical Focus (either Stage 1- Basic, or Stage 3 – Refresher and/or Social Behavioral
2. Good Clinical Practice and ICH (Group 5 for Emory University)
3. Health Privacy and Information Security (i.e., HIPAA for Clinical Research Staff)
4. Clinical Research Coordinator

**5. Complete Clinical Research Orientation & EHC Credentialing Review**The Clinical Research Orientation & EHC Credentialing Reviewis required for all new hires, rehires, and those who have been promoted in a new clinical research role (excluding investigators that receive an orientation from their respective department) at Emory University and Emory Healthcare conducting or coordinating an NIH definition of a clinical trial (view the [Emory Required Training for Investigators and Coordinators](https://ocr.emory.edu/_includes/documents/emory-required-training-for-investigators-and-coordinators-v11.pdf) policy).

Orientation is mandatory and in-person every 1st Monday of each month at the 1599 Clifton Road Building, 1st Floor, from 9:00 am – 1:00 pm. ***New hires will receive the clinical research welcome email and details from HR at Pre-Start.***Staff can elect to visit Emory Transportation for parking hangtags, Emory Administration for Emory Card/ID Badge, and Emory Employee Health for health checkoffs. Emory Healthcare (EHC) Credentialing will be fast-tracked for staff who meet specific criteria and have completed all required documentation per the checklist before orientation.

Training tracks will be identified and assigned at orientation based on their years of clinical research experience and years at Emory University. Follow the directions below to register.

* **Track 1: Green Learners**(0-2 years in clinical research) will complete Orientation, Part 1 and Part 2.
* **Track 2: Intermediate A Learners**(2-5 years in clinical research) will complete Orientation, Part 2 only. Part 1 will be required if you are new to Emory.
* **Track 3: Intermediate B Learners**  (5-10 years in clinical research) will complete Orientation, Part 2 only. Part 1 will be required if you are new to Emory.
* **Track 4: Advanced Learners**(10 years+) will complete Orientation only and be provided an exam to test out of Part 1 and 2. A score of 80% or higher is required.
* **Track 5: Bridge Gap Learners**at an Emory-affiliated site will complete Orientation at Emory University to understand Emory's workflow, but it may test our of Part 1 and 2. A score of 80% or higher is required. Work with your site's Training Manager for additional guidance.

Registration Details:

1. Login into [Emory Learning Management System (ELMS)](https://elprod.emory.edu/).
2. Enter your Emory University Network ID and password.
3. Click "Find Learning."
4. In the Search by Keyword box, enter course code **205100** *or* enter the course name “**Clinical Research Orientation**.” Then click “Enroll" for the course start date you want to attend. Click “Submit Enrollment.

**6. Review requirements for Emory Healthcare Research Credentialing**After speaking with your PI and/or Manager, determine if you need EHC Research Credentialing. Staff that will need it fit the following criteria:

* Need access to Emory Healthcare’s Epic medical record system, **or**
* Recruiting or conducting research visits in Emory Healthcare facilities, **or**
* Will perform clinical duties (i.e., Vital Signs, Phlebotomy, Height/ Weight measurements, ECGs) on human subjects, **or**
* Require access to Emory Healthcare facilities

For questions, contact [research.credentialing@emoryhealthcare.org](mailto:research.credentialing@emoryhealthcare.org) or 404.712.0510.

**7. Complete Clinical Research Training for staff working on an** [NIH-definition of a clinical trial](http://ocr.emory.edu/documents/NIH%20Definition%20of%20Clinical%20Trial.pdf).This is mandatory training for new and existing clinical research coordinators, research nurses, fellows, and residents at Emory and Emory affiliates coordinating NIH-definition of a clinical trial (which includes FDA-regulated studies) at Emory. The course provides a basic framework of the roles and responsibilities to equip clinical research coordinators, research nurses, fellows, and residents with the tools to succeed at Emory. Clinical Research Training Tracks will be assigned at Clinical Research Orientation according to years of research experience.

*\*Note: If this course is required, you will be notified at the Clinical Research Orientation. See registration details in #5 above.*

**8. Review the** [Emory Required Training for Investigators and Coordinators](https://ocr.emory.edu/_includes/documents/emory-required-training-for-investigators-and-coordinators-v11.pdf) **policy.**This policy provides details on what training is essential to begin conducting or coordinating clinical research at Emory. Review the Office for Clinical Research (OCR) courses website at <https://ocr.emory.edu/resources/training/courses.html>.

**9. Review your department’s Standard Operation Procedures (SOPs).**Each department has its own SOPs to ensure you understand things that will occur in your department based on internal processes, workflows, and guidelines. We encourage you to ask your PI/Manager/Supervisor for assistance.

As always, we are here to assist you! If you have questions about this checklist, contact the Office for Clinical Research at [OCR@Emory.edu](mailto:OCR@Emory.edu) or 404.778.4960.