**CLINICAL RESEARCH ONBOARDING CHECKLIST**

Before you start, you must know your research duties and view the [Emory Clinical Research Orientation &Training](https://ocr.emory.edu/_includes/documents/emory-required-training-for-investigators-and-coordinators-v11.pdf) policy. Discuss with your Principal Investigator (PI) and/or Manager all clinical-related activities you may be performing within your role, as they will determine the training, immunizations, and additional requirements you will need. **Complete and/or register for the following:**

1. [ ]  **Clinical Research Employee Training Profile.**

To begin the training pathway for your role, please complete your research RedCap eCREST employee profile form using this link <https://redcap.emory.edu/surveys/?s=3KRT7AKWMPNDAAMW>.

1. [ ]  **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 designed to help you better understand Emory's mission and culture and the benefits, programs, and resources available. You will be allowed to register as part of your onboarding tasks. Departments and/or Managers may have additional orientation requirements (e.g., observing/shadowing, monitoring, reviewing SOPs, etc.).

1. [ ]  **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.)

Certain immunizations and antibody screenings 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 to schedule any vaccinations or antibody testing. Alternatively, you may obtain vaccinations from your preferred healthcare provider.

1. [ ]  **CITI Training/Pre-requisites.**

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:

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 (only for those with this role/title)

**5.** [ ]  **Clinical Research Orientation & EHC Credentialing Review**The Clinical Research Orientation (CRO) & Emory Healthcare (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 clinical research studies (i.e., (i.e., observational, qualitative, socio-behavioral, and clinical trials)

CRO is mandatory and in-person every 1st Monday (except holidays) of each month at the 1599 Clifton Road Building, 1st Floor, from 8:30 am – 1:00 pm. CRO will allow new hires/rehires/promotions to visit [Emory Transportation](https://transportation.emory.edu/) for parking hangtags, Emory Administration for the [Emory Card](https://www.onecard.emory.edu/emorycard/get-card/index.html) ID badge, and Emory [Employee Health](https://hr.emory.edu/eu/wellness/occupational-injury-management/home-employee-health-portal.html) for health checkoffs.

EHC Credentialing is mandatory if you will be working at an Emory Healthcare facility (hospital, clinic, etc.) and/or need access to Emory Healthcare’s medical record system – Epic. Orientation will aid in fast-tracking staff through the EHC Credentialing process who meet specific criteria and have completed all required documentation from Step 1 above.

Follow the instructions below to register for the Clinical Research Orientation (CRO):

1. Log in to the Emory [Brainer Learning Management](https://emory.brainier.com/#/login) system.
2. Enter your Emory University username and password.
3. Search “Clinical Research Orientation.”
4. Click “Register” for the date you want to attend.

**6.** [ ]  **EHC Research Credentialing Requirements**Per Step 5, speak with your PI and/or Manager to determine if you need to be credentialed. Staff that need credentialing are those that:

* Need access to Emory Healthcare’s Epic medical record system **or**
* Recruiting or conducting research visits or activities in an Emory Healthcare facility **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 at research.credentialing@emoryhealthcare.org,

Or call 404.712.0510.

**7.** [ ]  **Clinical Research Training (CRT) – Baseline Training**Clinical Research Training (CRT)is required for all new hires, rehires, and those who have been promoted in a new clinical research role (excluding investigators who receive an orientation from their respective department) at Emory University and Emory Healthcare conducting or coordinating clinical research studies (i.e., (i.e., observational, qualitative, socio-behavioral, and clinical trials).

The training is based on **# 3 criteria:** #years of experience in clinical research, the type of human research study, and whether you are patient-facing. The training provides the concepts of clinical research and the basic framework of the roles and responsibilities at Emory University to equip clinical research staff with the tools to be successful in their job roles. View the [Executive Summary, V10,](https://cascade.emory.edu/renderfile/599357d20ae7209849ee8f9e2e9a830b/_includes/documents/crot-course_executive-summary_v10.docx) for more details.

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

**9.** [ ]  **Register for additional training after Clinical Research Training (CRT) – Baseline.**

* 1. [ ]  **AHA BLS CPR Training** CPR training is required for those who see subjects in an EHC facility.
	2. [ ]  **Conflict of Interest Training via** [**eDisclose**](https://rcra.emory.edu/coi/ecoi.html)COI training is required for all covered individuals; regardless of title or position, any person **responsible for research design, conduct, or reporting** should disclose financial interests. It is important that anyone involved with the design, conduct, or reporting of any research, in particular, disclose their financial interests.
	3. [ ]  **Department Training/Department Standard Operation Procedures (SOPs)**Supplemental training and department SOPs review will be provided by your department. Each department has its training and SOPs to ensure you understand things that will occur in your department’s internal processes, procedures, systems, and guidelines. We encourage you to ask your PI/Manager/Supervisor for assistance.
	4. [ ]  **Environmental Health & Safety (EHSO) Training**

EHSO training is required for is required annually for those working on protocols that involve biosafety, laboratory, shipping, and human bloodborne pathogens (including Grady campus or buildings (e.g., Ponce Clinic). View [EHSO courses](https://www.ehso.emory.edu/resources/training/courses.html).

* 1. [ ]  **Systems Training**

At Emory University, you will learn several systems, but **two main systems** are required to manage clinical research/trials.

* [ ] Emory Healthcare Medical Records System—Epic. Contact your department’s access coordinator to view the [Epic Checklist](https://emory.sharepoint.com/%3Aw%3A/r/sites/EPIC/_layouts/15/Doc.aspx?sourcedoc=%7B774EFEB0-70A7-4387-9350-CBC7D050D2DD%7D&file=EHC%20Staff%20Epic%20Checklist_Final.docx&action=default&mobileredirect=true).
* [ ] Emory University Clinical Trials Management System – view [OnCore Training](https://ocr.emory.edu/resources/training/courses.html).

**10.** [ ]  **Training Documentation:** As a final step to being onboard at Emory University, provide this checklist at your annual review.

**NAME:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **HIRE DATE:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| Onboarding Tasks/Training | Date Started  | Date Completed |
| 1. Emory Clinical Research Orientation
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| 1. Emory University New Employee Welcome Session
 |  |  |
| 1. Immunization Requirements
 |  |  |
| 1. CITI Trainings
 |  |  |
| 1. **Clinical Research Orientation & Baseline Training**
 |  |  |
| 1. EHC Research Credentialing Requirements, if applicable.
 |  |  |
| 1. Month 1 (Study Visit and Documentation)
 |  |  |
| 1. Month 2 (Check-In)
 |  |  |
| 1. Month 3 (Financial Management and Research Billing)
 |  |  |
| 1. Month 6 (Study Closeout and Record Retention)
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| 1. Month 12 (Yearly Review)
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**JOB TITLE:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Onboarding verified by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

As always, contact OCR@emory.edu or 404.778.460 for questions.