**Clinical Research Orientation and Training for Emory University**

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Approved by ORA VPs



Page 1 of 2

Clinical research **orientation and baseline training** are required for all new hires/rehires/promotions conducting or coordinating [clinical research studies](https://www.nia.nih.gov/health/clinical-trials-and-studies/what-are-clinical-trials-and-studies#:~:text=Clinical%20research%20is%20the%20study,monitor%20people%20in%20normal%20settings.) (i.e., observational, qualitative, socio-behavioral, and clinical trials) at Emory University. Training will also include Months 1, 3, 6, and 12 training sessions or reviews for monitored continuous learning, but annually for existing staff. New *Investigators* who are magnet-designated®, Clinical Research Nurses, Clinical Research Coordinators, or [Other Key Personnel](mailto:Other%20Key%20Personnel) are assigned their learning curriculum at the [Clinical Research Orientation](https://www.ocr.emory.edu/resources/training/orientation.html). CME/CEU/Nursing [credits](http://ocr.emory.edu/training/Continuing%20Credits.html) are issued for several courses and organizations. *Review the table below and page 2 for affiliated sites, including Winship Cancer Institute CTO Staff.*

Emory University's [IRB](https://irb.emory.edu/) will verify that all clinical research staff have completed the CITI courses, which are prerequisites to the baseline training. The [OCR](https://ocr.emory.edu/resources/training/orientation.html) will conduct quarterly reviews of baseline training participation. Non-compliance will be reported to relevant compliance agencies. To reduce study disruptions, ensure staff complete the necessary training based on their roles. Any extra-departmental training will be considered supplemental.

Emory Healthcare (EHC) **research credentialing** is required for Emory University clinical research staff who have direct contact with subjects in an [EHC facility](https://www.emoryhealthcare.org/locations?CareType=&SpecialtyCare=&Coordinates=33.8266441129908%2C+-84.35649618811199) and/or will need access to patient medical records in [Epic](https://ocr.emory.edu/resources/systems/epic.html) for EHC subjects, including remote staff who need access to patient’s medical records. Direct contact is defined as transporting patients, collecting specimens, obtaining vital signs, obtaining measurements, performing ECGs, phlebotomy, etc.). For information,contact the EHC Research Credentialing Office at [research.credentialing@emoryhealthcare.org](mailto:research.credentialing@emoryhealthcare.org) or 404.712.0510. Please review the [Clinical Research Role Matrix](https://ocr.emory.edu/_includes/documents/ehc-clinical-research-role-matrix31.xlsx) to understand your roles and responsibilities.   
  
If you are a student or a staff member observing or shadowing an Investigator, please contact [OCR@Emory.edu](mailto:OCR@Emory.edu) for guidance.

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| **Role** | **Type of Study** | **Biomedical Focus** [CITI](https://about.citiprogram.org/en/homepage/) 1 | **CRC** [CITI](https://about.citiprogram.org/en/homepage/)4 | **GCP-ICH** [CITI](https://about.citiprogram.org/en/homepage/) 2 | **Health Privacy & Information Security**  [CITI](https://about.citiprogram.org/en/homepage/) | **SHB** [CITI](https://about.citiprogram.org/en/homepage/) 1 | **Clinical Research Orientation** [Brainer](https://emory.brainier.com/#/login) | **Clinical Research Baseline Training**  [Brainer](https://emory.brainier.com/#/login) | **eDisclose**  [eDisclose3](https://emory.sharepoint.com/sites/eDisclose/SitePages/Training.aspx) | **EHSO** [BioRaft](https://nam11.safelinks.protection.outlook.com/?url=http%3A%2F%2Fwww.healthstream.com%2Fhlc%2Femoryhc&data=05%7C02%7Criley.bayly%40emory.edu%7Cdfb5400534b04142b7b908dd88071364%7Ce004fb9cb0a4424fbcd0322606d5df38%7C0%7C0%7C638816286155488520%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=ZBKXiCwR46mb%2BiF0kMTjVsGXEowf0okbUHPZ4ubgX2g%3D&reserved=0)5 | OnCore and EPIC  [Brainer](https://emory.brainier.com/#/login)6 |
| Investigators  (PI, Co-I, or Sub-I) | Investigators working on NIH-defined clinical trials, including FDA-regulated clinical trials. | X |  | X | X |  | Attend your department or [SOM Orientation](https://med.emory.edu/about/faculty/faculty-development/career-development/new-faculty-orientation-and-resources/index.html). |  | X | X | X |
| Investigators working on an NIH-supported clinical trial that is *not* FDA-regulated. | X  (or SHB CITI) |  | X | X | X  (or Biomed CITI) | Attend your department or [SOM Orientation](https://med.emory.edu/about/faculty/faculty-development/career-development/new-faculty-orientation-and-resources/index.html). |  | X | X | X |
| Investigators working on a clinical research study that is neither FDA-regulated nor NIH-funded. | X  (or SHB CITI) |  |  | X | X  (or Biomed CITI) | Attend your department or [SOM Orientation](https://med.emory.edu/about/faculty/faculty-development/career-development/new-faculty-orientation-and-resources/index.html). |  | X | X | X |
| Investigators who are magnet-designated® working on studies per NIH definition. | X  (or SHB CITI)  X  (or SHB CITI) | X | X | X | X (or Biomed CITI) | X | X | X | X | X |
| Clinical Research Nurses, Coordinators, Research, Pharmacists, and Other   [Key Personnel](mailto:https://ocr.emory.edu/resources/training/index.html) | Clinical research staff working on NIH-defined clinical trials, including FDA-regulated clinical trials. | X | X | X | X |  | X (if new to Emory, Rehire, or Promotion) | X | X | X | X |
| Clinical research staff working on an NIH-supported clinical trial that is not FDA-regulated. | X  (or SHB CITI) | X | X | X | X  (or Biomed CITI) | X (if new to Emory, Rehire, or Promotion) | X | X | X | X |
| Clinical research staff working on a clinical research study  that is neither FDA-regulated nor NIH-funded. | X  (or SHB CITI) |  |  | X | X  (or Biomed CITI) | X (if new to Emory, Rehire, or Promotion) | X | X | X | X  If billables or OCR invoiced |

1 The Biomedical Refresher includes three additional Emory-specific modules (Emory Institutional & Regulatory Information, Audit Findings, and Ethical Issues in Clinical Research). Renewal every three years in CITI.

2 CITI Group 5: GCP & ICH courses are for clinical research staff working on [NIH-definition of a clinical trial](https://grants.nih.gov/policy/clinical-trials/definition.htm) (which includes FDA-regulated studies) clinical trials. Renewal is every three years in CITI.

3 The eDisclose, previously eCOI, training is for faculty and staff to disclose financial interests and request approval for external activities. Please visit COI’s [eDisclose SharePoint site](https://emory.sharepoint.com/sites/eDisclose/SitePages/Training.aspx).

4 The CITI CRC (Clinical Research Coordinator) course is for experienced and non-experienced clinical research nurses, coordinators, and other key personnel who function as coordinators. It is renewed every three years in CITI.

5 Bloodborne Pathogens (BBP) for Research training is required annually for those working on protocols that involve human bloodborne pathogens (including Grady campus or buildings (e.g., Ponce Clinic). Additional training in biosafety and laboratory may be required

from [EHSO](https://www.ehso.emory.edu/training/courses.html). The EHSO—Shipping and Transport of Biological Materials and Refrigerants (Dry Ice) training course is available at [CITI](https://about.citiprogram.org/).  
6 OnCore CTMS training is provided by your department’s OnCore Superuser. Complete the steps on the [OnCore webpage](https://ocr.emory.edu/resources/systems/oncore.html) for your role. Epic training information can be found on the OCR [Epic webpage.](https://ocr.emory.edu/resources/systems/epic.html)

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All new hires/rehires/promotions who conduct or coordinate clinical research studies with an Emory investigator may be subject to additional training at Emory. **Please review the chart below.**



Page 2 of 2

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| **Role** | **Emory Affiliated Sites** | **Emory Biomedical/SHB**  [CITI](https://about.citiprogram.org/en/homepage/) 1 (see pg.1) | **Emory CRC**  [CITI](https://about.citiprogram.org/en/homepage/) | **Emory GCP-ICH**  [CITI](https://about.citiprogram.org/en/homepage/) 2 (see pg.1) | **Emory CITI**  **Health Privacy and**  **Information Security**  [CITI](https://about.citiprogram.org/en/homepage/) | **Emory Clinical Research Orientation & Baseline Training** | **OnCore** and EPIC  [Brainer](https://emory.brainier.com/#/login)6 |
| Clinical Research Nurses, Coordinators, Research Pharmacists, or [Key Personnel](mailto:https://ocr.emory.edu/resources/training/index.html) | **Atlanta Veterans Administration  Medical Center (AVAMC)** **New hires** must work with Tedra Ricks at  404-321-6111 ext.206190 in  the credentialing office.  **For IRB application submissions,** visit [https://www.va.gov/atlanta-health-care/research/.](https://www.va.gov/atlanta-health-care/research/) | Atlanta VA CITI Biomedical/SHB is  **Equivalent to Emory**. AVAMC staff must affiliate with Emory and complete **three** additional modules or SHB, if needed, as a part of  the pre-req for CRO/CRT. | Atlanta VA CITI does not  offer the CITI CRC course and  **Not Equivalent to Emory.**   AVAMC staff must complete if they work with an  Emory PI at an Emory site, as  a part of the pre-req for CRO/CRT. | Atlanta VA CITI GCP-ICH  **Equivalent to Emory.**   AVAMC staff must affiliate with Emory and complete **three** additional modules or SHB, if needed, as a  part of the pre-req for CRO/CRT. | Atlanta VA CITI Health Privacy and Information Security is **Equivalent to Emory.**   AVAMC staff entering data in OnCore CTMS or accessing the Epic medical record system must submit proof of completion for system access. | Emory CRO/CRT is **Not Equivalent** to AVAMC Research Training. It is mandatory and specific to Emory's processes.  If an AVAMC staff works for an Emory PI using their Emory appointment,  they must complete this training. | OnCore CTMS training is **Not Equivalent**  to any AVAMC CTMS Training.    AVAMC staff who see subjects at an Emory facility must undergo OnCore training with their Superuser and complete Emory Epic training to access the medical record system. |
| **Children’s Healthcare of Atlanta (CHOA)**  **New hires** must contact  Research Education Manager Jennifer Shipp for training and sponsored accounts at [researchheducation@choa.org](mailto:researchheducation@choa.org) or 404.785.3535.  **For IRB application submissions,** visit <https://www.choa.org/research/institutional-review-board>. | Children’s CITI  |Biomedical/SHB is  **Equivalent to Emory**. | Children’s does not offer the CITI CRC course for those who function as coordinators. **Not Equivalent to Emory.**  Children’s staff must complete if they work with an  Emory PI at an Emory site, as  a part of the pre-req for CRO/CRT. | Children’s CITI  GCP-ICH is  **Equivalent to Emory**.. | CITI Health Privacy and Information Security is different for each institution  **Equivalent to Emory.**   Children’s staff must complete if you  enter data in OnCore CTMS or access the Epic medical record system. | Emory CRO/CRT is **Not Equivalent**  to CHOA’s Research Training. It is  mandatory and specific  to Emory's processes.   If a Children’s staff works for an Emory PI using their Emory appointment,  they must complete this training. Work with Jennifer Shipp. | OnCore CTMStraining is **Not equivalent**  to CHOA’s Velos CTMS**.**  Children’s staff must  complete OnCore training with their Superuser if they enter data in Emory OnCore CTMS, and complete Emory Epic training to access the medical record system. |
| **Grady Health System (GHS)** **New hires** must contact Associate Director of Research Programs Naquia Mitchell at <mailto:EGResearch@emory.edu>  or 404-727-9365.  **For IRB/ROC application submissions,** visit <https://www.gradyhealth.org/office-of-research-administration/#services>. | Grady staff employed  by Emory  **must be complete**  Emory CITI Biomedical or SHB. | Grady staff employed  by Emory  **must be complete**  Emory CITI CRC module if they function as a coordinator | Grady staff employed  by Emory  **must be complete**  Emory CITI GCP-ICH module. | Grady staff employed  by Emory  **must be complete**  Emory CITI Health Privacy and Information Securityif they enter data in OnCore CTMS or access the Epic medical record system. | Grady staff employed  by Emory **must be complete** Emory CRO/CRT course in addition to any training offered by Grady. Work with Naquia Mitchell. | OnCore CTMS training is **Not Equivalent**  to any Grady CTMS Training.    Grady staff who see subjects at an Emory facility must undergo OnCore training with their Superuser and complete Emory Epic training to access the medical record system. |
| Winship CTO Staff | **Winship Cancer Institute (WCI)**  **New hires** must contact Senior Program Associate Ashlea Moore at [Amoor30@emory.edu](mailto:Amoor30@emory.edu) or 404-727-0942.  **Note:** The Winship Regulatory team handles IRB submissions.   |  |  | | --- | --- | |  |  | |  |  | | Winship CTO staff employed  by Emory  **must be complete**  Emory CITI Biomedical or SHB. | Winship CTO staff employed  by Emory  **must be complete**  Emory CITI CRC module if they function as a coordinator.  CITI = Collaborative Institutional Training Initiative CTMS = Clinical Trials Management System  CRC = Clinical Research Coordinator  CRO/CRT = Clinical Research Orientation & Clinical Research Training  eCOI = Electronic Conflict of Interest  EHSO = Environmental, Health & Safety Office  ELMS = Emory Learning Management System  FDA = Food & Drug Administration | Winship CTO staff employed  by Emory  **must be complete**  Emory CITI GCP-ICH module. | Winship CTO staff employed  by Emory  **must be complete**  Emory CITI Health Privacy and Information Securityif they enter data in OnCore CTMS or access the Epic medical record system. | Winship CTO staff employed by Emory **must be complete** Emory CRO/CRT course and any training offered by Winship for onboarding. Work with Ashlea Moore. | Winship CTO staff  employed by Emory **must be complete**  OnCore training with their TEO team and Emory Epic training  if they enter data in OnCore CTMS or access the Emory medical record system. |

***Note:*** *Emory Clinical Research Orientation is not required for non-Emory staff but will be essential to understand how research is conducted at Emory. We will work with your site’s Training Manager to address your training needs.*

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GCP & ICH = Good Clinical Practice & International Conference of Harmonization

HIPAA = Health Insurance Portability & Accountability Act

IRB = Institutional Review Board

NIH = National Institutes of Health

ROC = Research Oversight Committee

SHB = Social Health & Behavioral

SOM = School of Medicine