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| New Clinical Research Employee Onboarding Checklist |
| **Name:** | **Email:** |
| **Employee ID:** | **Position:** |
| **How to Use This Checklist:**Review this checklist with your supervisor to identify which trainings and onboarding activities are appropriate for you based on your role and assigned research duties. As you use the checklist, please note the following:* Verify that you have the most recent version of the checklist from the OCTRI Website.
* Compass is OHSU’s Learning Management system. You can find the link to Compass on the main O2 intranet webpage. Login to Compass and search for the classes listed below
* If you are unsure if you need to complete a particular training, ask your supervisor.
* If you are still having trouble or if you find an error in this form, email OCTRI@ohsu.edu and we can help.

This checklist may not include all of the trainings you need to complete. It does not replace or include department specific trainings, Industry Sponsor required trainings, study specific equipment/systems training.  |
| **Date****completed** | **Task** | **Location** |
|  | **New Employee Orientation (NEO)** | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | ***General OHSU Online Training:**** Respect at the University
* Information Privacy and Security Essentials (required for employee badge)
* Integrity Foundations
* Integrity Booster
* Emergency Preparedness at Work and Home
* Covid-19 Core Training
* Violence in the Workplace
* Fraud, Waste and Abuse
* Cardiovascular Health
 | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | **Get Employee Badge** Instructions on O2 ID Badges webpage  |  Transportation and Parking |
|  | ***Occupational Health*** All Occupational Health Requirements must be completed within 7 days of starting at OHSU. Check the Occupational Health Compliance Verification Tool to determine which vaccines and other services are required based on your mandatory job requirements.  | Occupational Health<https://o2.ohsu.edu/occupational-health/regulatory-services.cfm>  |
|  | ***System/Network Access:**** **eIRB eCRIS Account Registration** –eIRB Access is required for anyone working on human subjects research projects.
 | eIRB home page |
|  | * **X: drive** Access determined by department/X drive owners.
* **OneDrive, Teams**, **etc**. access determined by study team
 | CARS RequestAccess granted by file owner |
|  | ***eCRIS – OHSU Clinical Research Management System**** Watch eCRIS overview video
* Contact eCRIS for one-on-one training
* Review eCRIS Manual
 | eCRIS Access and Training <https://o2.ohsu.edu/ecris/access-and-training.cfm>  |
|  | ***IRB 101 Training Modules**** Intro to IRB (Getting Started)
* Intro to IRB (Overview)
* Intro to IRB (non-OHSU Collaborators)
 | OHSU IRB Education and Resources webpage |
|  | ***OHSU Clinical Environment**** Annual Competency in Basic Principles of Infection Prevention
* Compliance Program Training
* Dangerous Good and Biological Materials Shipper Training
 | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1)  |
|  | **Laboratory Training** * Introduction to Laboratory Safety at OHSU
* Bloodborne Pathogen Training – required for anyone working with human sourced materials.
 | BioRAFT – <https://ohsu.bioraft.com/>  |
|  | ***EpicCare:**** Epic Training Pre-Work: EpicCare for Research Staff
* Virtual: Epic Training for Research Staff
 | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | ***Conflict of Interest in Research (CoIR) or eCoI*** Must be completed prior to IRB approval and annually | <https://bigbrain.ohsu.edu/coi/>  |
|  | ***Sign up for applicable Newsletters & Distro lists:**** Clinical Research United (CRU) Newsletter
* Join CRU Teams Channel
* Research Administration Info Network (RAIN)
 | OHSUCRU@ohsu.edu RAIN@ohsu.edu |
| **Complete at next available offering** |
|  | RDA 101: Introduction to Research Administration | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | RATE: Clinical Trials 1: Budgeting, Coverage Analysis, and Account Set-up | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) for live classslides on [RATE webpage](https://bridge.ohsu.edu/community/rate/_layouts/15/WopiFrame2.aspx?sourcedoc=%7b6e51a690-62c2-4988-8955-66aa18c6cd90%7d&action=default) |
|  | RATE: Clinical Trials 2: Post-Award Finances (billing, reconciliation, closeout) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) for live classSlides on [RATE webpage](https://bridge.ohsu.edu/community/rate/_layouts/15/WopiFrame.aspx?sourcedoc=%7b492A574A-14FA-4F23-BC67-C218A6AB7D39%7d&file=Clinical%20Trials%202%20Post-Award%20Class%20Slides.pptx&action=default) |
|  | OCTRI Study Coordinator Training Series * OCTRI Clinical Research Coordinator Workshop
* OCTRI Essential Regulatory and Source Documents
* OCTRI Writing and Obtaining Informed Consent
* OCTRI Navigating Monitoring Visits and Audits for Clinical Trials
* OCTRI Analyzing and Implementing a Research Protocol
 | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1)If no dates are available, register and you will be notified as they are scheduled or converted to eLearning |
| **On Demand eLearnings**  |
|  | * OCTRI Research Subject Injuries: Identification and Reporting at OHSU (1 CEU available)
 | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | * Recognizing Coded and De-Identified Training
 | [OCTRI Training and Education for Clinical Research Professionals](https://www.ohsu.edu/octri/training-and-education) |
| **Recommended OCTRI Research Forum Past Seminars** |
|  | * Clinicaltrials.gov (3 trainings available)
* Case Report Form Development
* Electronic Consent
* Assessing Study Feasibility
* Adverse Event Data Management (2 trainings available)
 | [OCTRI Research Forum](https://www.ohsu.edu/octri/octri-research-forum-your-monthly-clinical-and-translational-research-event) [Past Seminars](https://www.ohsu.edu/octri/octri-research-forum-your-monthly-clinical-and-translational-research-event)Recordings, slides and handouts available |
| **Additional Trainings that may be required depending on duties assigned.**  |
|  | Hospital Point Of Care Testing (POCT)Hemoglobin, Pregnancy, Urine Dips as needed  | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | Animal Care and Use (ACU): Working with the IACUC Take if working in animal research | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) or CITI |
|  | BioSafety/Biosecurity: Working with rDNA/Infectious Agents/Toxins: (required if you work with recombinant DNA, Synthetic Nucleic Acid Molecules in cells, organisms or viruses, infectious agents or biologically-derived toxins) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) or CITI |
|  | 12 Lead EKG Competency (if performing ECGs) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | Phlebotomy Draw Class(if drawing blood) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | Oracle Requisitions (if ordering supplies) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |
|  | MRI Safety Foundations (if working with MRI) | [Compass](https://idp.ohsu.edu/idp/profile/SAML2/POST/SSO?execution=e1s1) |