

New Clinical Research Employee Onboarding Checklist

Name:

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 position 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
	General OHSU Online Training: <ul style="list-style-type: none"> • 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
	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: <ul style="list-style-type: none"> • eIRB/ eCRIS Account Registration –eIRB Access is required for anyone working on human subjects research projects. 	eIRB home page
	<ul style="list-style-type: none"> • X: drive Access determined by department/X drive owners. • OneDrive, Teams, etc. access determined by study team 	CARS Request Access granted by file owner
	eCRIS – OHSU Clinical Research Management System <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Intro to IRB (Getting Started) • Intro to IRB (Overview) • Intro to IRB (non-OHSU Collaborators) 	OHSU IRB Education and Resources webpage
	OHSU Clinical Environment <ul style="list-style-type: none"> • Annual Competency in Basic Principles of Infection Prevention • Compliance Program Training • Dangerous Good and Biological Materials Shipper Training 	Compass
	Laboratory Training <ul style="list-style-type: none"> • Introduction to Laboratory Safety at OHSU • Bloodborne Pathogen Training – required for anyone working with human sourced materials. 	BioRAFT– https://ohsu.bioraft.com/

	EpicCare: <ul style="list-style-type: none"> • Epic Training Pre-Work: EpicCare for Research Staff • Virtual: Epic Training for Research Staff 	Compass
	Conflict of Interest in Research (CoIR) or eCol Must be completed prior to IRB approval and annually	https://bigbrain.ohsu.edu/coi/
	Sign up for applicable Newsletters & Distro lists: <ul style="list-style-type: none"> • 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
	RATE: Clinical Trials 1: Budgeting, Coverage Analysis, and Account Set-up	Compass for live class slides on RATE webpage
	RATE: Clinical Trials 2: Post-Award Finances (billing, reconciliation, closeout)	Compass for live class Slides on RATE webpage
	OCTRI Study Coordinator Training Series <ul style="list-style-type: none"> • 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 Changes coming soon!!! , Dates TBD but Register for these classes and you will be notified as they are scheduled or converted to eLearning
On Demand eLearnings		
	<ul style="list-style-type: none"> • OCTRI Research Subject Injuries: Identification and Reporting at OHSU 	Compass
	<ul style="list-style-type: none"> • Recognizing Coded and De-Identified Training 	OCTRI Training and Education for Clinical Research Professionals
	<ul style="list-style-type: none"> • GCP and OHSU Research Documentation Standards (1.5 CEU Available) 	Compass
Recommended OCTRI Research Forum Past Seminars		
	<ul style="list-style-type: none"> • Clinicaltrials.gov (3 trainings available) • Case Report Form Development • Electronic Consent • Assessing Study Feasibility • Adverse Event Data Management (3 trainings available) • Research Across the Bridge: Conducting a Project at VAPORHCS 	OCTRI Research Forum Past Seminars 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
	Animal Care and Use (ACU): Working with the IACUC Take if working in animal research	Compass 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 or CITI
	12 Lead EKG Competency (if performing ECGs)	Compass
	Phlebotomy Draw Class (if drawing blood)	Register with the CTCR https://app.smartsheet.com/b/form/6250328c1f834f96a1711dc1c12b98f7
	Oracle Requisitions (if ordering supplies)	Compass
	MRI Safety Foundations (if working with MRI)	Compass