

## Onboarding Checklist for Clinical Research Coordinators at UCSF

#	Completed Y   N	Topic		Resource	Notes	PI	Clinical Research Manager / Supervisor	CRC
		Items below completed by PI, Clinical Research Manager/Supervisor or CRC						
1		Occupational Health Screening	<a href="https://occupationalhealthprogram.ucsf.edu/home">https://occupationalhealthprogram.ucsf.edu/home</a>		You or your supervisor must make an appointment to have health screening clearance prior to exposure to patients	x	x	x
2		Add CRC to study in iRIS	Add to IRB applications (in IRIS)		<a href="https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/Personnel%20Form%20Instructions_Campus_0917.pdf">https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/Personnel%20Form%20Instructions_Campus_0917.pdf</a>	x	x	
3		Add CRC to study in OnCore (if applicable)	OnCore (oncore@ucsf.edu)		<a href="https://ucsf.co1.qualtrics.com/ife/form/SV_0HeVakMRibdTisZ">https://ucsf.co1.qualtrics.com/ife/form/SV_0HeVakMRibdTisZ</a>	x	x	
4		Add CRC to study in APeX (if applicable)	APEX study builds		<a href="https://ucsf.service-now.com/ucsfit?id=ucsf_index">https://ucsf.service-now.com/ucsfit?id=ucsf_index</a>	x	x	
5		Add CRC to study documents	Add to delegation log in regulatory binder and document training		Be sure all studies track staff responsibilities and training	x	x	
6		Subscribe to CRC ListServ	<a href="https://irb.ucsf.edu/clinical-research-coordinators-council#listserv">https://irb.ucsf.edu/clinical-research-coordinators-council#listserv</a>		Also contact department/division admin for other distribution lists			x
7		Review the Training Checklist (next tab)	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>					x
8		Review the Resources tab						x

For questions please email CTO@UCSF.EDU

'x' indicates who should complete for the new hire

UCSF Suggested Training for Clinical Researcher Coordinators at UCSF											
#	completed Y   N	Topic	Resource	Notes			Behavioral	Observational	Interventional	Certificate / Documentation Provided	Approx. length of time to complete (min)
				New Hire and Onboarding Resources (Recommended Week 1-2)							
1		HIPAA 101	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	HIPAA 101 - Privacy and Security for New UCSF Faculty, Staff, Trainees, Students and Volunteers (1.4)							
2		HIPAA and Data Security for Researchers (IRB)	<a href="https://irb.ucsf.edu/hipaa">https://irb.ucsf.edu/hipaa</a>	<a href="https://irb.ucsf.edu/electronic-data-security">https://irb.ucsf.edu/electronic-data-security</a>							
3		CITI Human Subjects Training	<a href="http://irb.ucsf.edu/citi-human-subjects-training">http://irb.ucsf.edu/citi-human-subjects-training</a>	Required training for all human research studies	R	R	R	Y		240	
4		CITI GCP	<a href="https://www.citiprogram.org/">https://www.citiprogram.org/</a>	Good Clinical Practice training is usually optional but highly recommended	R	R	R	Y		360	
5		IRIS Training (IRB)	<a href="https://iris-help.ucsf.edu/irb-iris">https://iris-help.ucsf.edu/irb-iris</a>	IRB training videos for online application system	C	C	C			60	
6		Infection Control Training (UCLearning)	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	Infection Control Training for Ancillary Staff	C	C	R	Y		30	
7		Annual Safety Training (UCLearning)	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	Annual Safety Training for Staff	C	C	R	Y		60	
8		Bloodborne Pathogen Training (UCLearning)	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	Bloodborne Pathogens (Campus)	C	C	R	Y		45	
9		Safe Shipping (UCLearning)	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	Safe Shipping of Biohazards/Dry Ice	a	a	R	Y		30	
10		OnCore	<a href="https://trialactivation.ucsf.edu/oncore-account-creation-training">https://trialactivation.ucsf.edu/oncore-account-creation-training</a>	Complete Intro course on UC Learning Ctr to request access or email OnCore@ucsf.edu.	a	a	R	Y		120	
11		APeX CRC Training	<a href="https://apextraining.ucsfmedicalcenter.org/sso/finder/plans/other-clinical/clinical-research/crc.aspx">https://apextraining.ucsfmedicalcenter.org/sso/finder/plans/other-clinical/clinical-research/crc.aspx</a>	UC Learning Center > APeX > 'Non-Clinical Staff' > 'Clinical Research Coordinator' > 'CRC'.	a	a	R	Y		240	
<b>Core Training (Recommended Weeks 2-6)</b>											
12		CRC Bootcamp Training: Orientation, CRC 101 and CRC 102	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>	Sign up and allocate time to take all instructor led courses offered via ZOOM	C	R	R			60	
13		CRC 103a Pre & Post Award Tasks	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>		C	C	C			90	
14		CRC 104 Effective Communications	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>		R	R	R			90	
15		CRC 106 Data Management	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>		R	R	R			90	
16		CRC 105 Investigational New Device	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>		Offered on demand via online learning platform	C	C	R			30
<b>Supplemental or Advanced Training Resources for CRCs</b>											
33		CRC 201 Audit Readiness	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>	Offered on demand via online learning platform	a	a	R			30	
34		CRC 202 Protocol Training, MOPs & SOPs	<a href="https://crs.ucsf.edu/crc-training">https://crs.ucsf.edu/crc-training</a>	Sign up and allocate time to take instructor led courses offered via ZOOM	C	C	R			120	
35		Policies for Petty Cash Handlers (UCLearning)	<a href="https://training.ucsf.edu/">https://training.ucsf.edu/</a>	Useful if you handle gift cards for research participants	a	a	a	Y		60	
For questions please email CTO@UCSF.EDU							R = required; C = recommended; a= as needed, or if applicable				

UCSF					Informational Resources for Clinical Researcher Coordinators at UCSF			Behavioral	Observational	Interventional	Certificate / Documentation Provided	Approx. length of time to complete (min)
#	completed Y   N	Topic	Resource	Notes								
<b>New Hire and Onboarding Resources (Recommended Week 1-2)</b>												
1		Review IRB Website	<a href="https://irb.ucsf.edu/">https://irb.ucsf.edu/</a>	Institutional Review Board (IRB), previously known as "ChR"; selected links below	R	R	R				30	
2		Review The HUB Website and Training List	<a href="http://hub.ucsf.edu/">http://hub.ucsf.edu/</a>	Clinical Research Resource HUB (lots of info for CRCs)	R	R	R				15	
3		APEX CRC Knowledge Bank	<a href="http://myapex.ucsf.edu/researchcrc">http://myapex.ucsf.edu/researchcrc</a>		a	a	R				120	
4		Role of the CRC (IRB)	<a href="http://irb.ucsf.edu/responsibilities-pis-and-crcs">http://irb.ucsf.edu/responsibilities-pis-and-crcs</a>	Summary of the responsibilities of the PI and CRC	R	R	R				10	
5		Informed Consent Info (IRB)	<a href="http://irb.ucsf.edu/obtaining-and-documenting-informed-consent">http://irb.ucsf.edu/obtaining-and-documenting-informed-consent</a>	IRB guidance on the informed consent process	R	R	R				30	
6		Research Integrity Training	<a href="http://oi.hhs.gov/TheResearchClinic">http://oi.hhs.gov/TheResearchClinic</a>	Entertaining interactive video for training research staff	C	C	C				60	
7		Introduction to The Regulatory Binder (HUB)	<a href="https://hub.ucsf.edu/virtual-regulatory-binder">https://hub.ucsf.edu/virtual-regulatory-binder</a>	Guidance on creation and maintaining essential documents	a	C	R				30	
8		Research Tools and Enrollment Logs (IRB)	<a href="http://irb.ucsf.edu/research-tools-and-checklists">http://irb.ucsf.edu/research-tools-and-checklists</a>	Templates for study logs and other study tools	R	R	R				30	
9		Amendments and Version Control (IRB)	<a href="http://irb.ucsf.edu/modification">http://irb.ucsf.edu/modification</a>	Guidance regarding protocol amendments and modification applications	C	C	C				10	
10		Study Start-up Checklist (HUB)	<a href="https://hub.ucsf.edu/clinical-research/setup-study">https://hub.ucsf.edu/clinical-research/setup-study</a>	Steps to begin new clinical from receipt of protocol to enrollment of 1st subject	C	C	C				30	
11		Budgets and Coverage Analysis (HUB)	<a href="http://hub.ucsf.edu/ca-budget-billing">http://hub.ucsf.edu/ca-budget-billing</a>	Describes the importance of compliant clinical research billing practices	C	C	R				30	
12		Post-approval Reporting Summary (IRB)	<a href="https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/post-approval-reporting-summary-sheet-%20%286-1-20%29.pdf">https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/post-approval-reporting-summary-sheet-%20%286-1-20%29.pdf</a>	A summary sheet of all AE/SAE, safety, new IB, DSMB, protocol incident and violation reporting	R	R	R				30	
13		Participant incentive policies (IRB)	<a href="http://irb.ucsf.edu/research/subject-payments">http://irb.ucsf.edu/research/subject-payments</a>	Guidance regarding subject payments	a	a	a				10	
14		Subject Injury Program	<a href="http://irb.ucsf.edu/treatment-and-compensation-injury">http://irb.ucsf.edu/treatment-and-compensation-injury</a>	Policy on reporting subject injury (AE as a result of study participation)	a	C	R				10	
15		Recruitment (IRB and HUB)	<a href="http://irb.ucsf.edu/recruitment">http://irb.ucsf.edu/recruitment</a>	<a href="https://recruit.ucsf.edu/">https://recruit.ucsf.edu/</a>	C	C	C				15	
16		IDS Pharmacy Information	<a href="http://ids.ucsf.edu/">http://ids.ucsf.edu/</a>	Log-in using your MyAccess account	a	a	C				10	
17		Protocol Development (HUB)	<a href="https://hub.ucsf.edu/protocol-development">https://hub.ucsf.edu/protocol-development</a>	Basic information about protocol organization and development	a	a	a				10	
18		CRS Procedures and Budget Estimate	<a href="https://accelerate.ucsf.edu/research/crs">https://accelerate.ucsf.edu/research/crs</a>	For studies that use CRS, PCRC or other CTSI services (look up by location)	a	a	a				10	

For questions please email CTO@UCSF.EDU

R = required; C = recommended; a= as needed, or if applicable