Onboarding Checklist

for Clinical Research Professionals (CRPs)

This checklist was developed to aid investigators, research program managers, and administrators with efficiently onboarding new study team members by connecting them to centralized trainings and research resources commonly used at MUSC. Activities are organized in broad categories and spaced out over the first month of employment. This checklist is intended to complement the processes established by research programs, departments, and colleges for onboarding new research staff engaged in clinical and translational research.

Week 1- Getting connected and mandatory trainings

Activity	Information/Link	Date Completed	Not Applicable
Register to receive MUSC Alerts	https://web.musc.edu/about/safety/public-safety/musc-alerts		
Complete the MUSC Conflict of Interest Training & Disclosure	https://web.musc.edu/about/coi		
Complete MUSC required (mandatory) trainings in OurDay	https://www.myworkday.com/wday/authgwy/musc/login.htmld		
Watch Overview of Research – Introduction	Use this link to view a short video introduces the offices and resources to support research at MUSC.		
Complete the self-registration process to access MUSC eIRB	First time users need to register and create an account at https://eIRB.healthsciencessc.org Once an account is setup, users may access several eIRB training resources. https://research.musc.edu/resources/ori/irb/education/eirb-training-and-guidance		
Subscribe to SCTR's weekly eNewsletter	Features information about research resources, training, events, and funding opportunities Visit this link to subscribe.		
Subscribe to ORD's newsletters	Subscribe to the monthly, Research Connections and/or weekly Funding Focus newsletters from the Office of Research Development using this link.		
Subscribe to the ORSP Research listserv	This listserv is used to update MUSC faculty and staff about news and activities affecting the management of sponsored research projects. Subscribe here		
Sign up for the MUSC Vice President for Research listserv	The Office of the Vice-President for Research listserv is the source for research information encompassing the MUSC enterprise. Visit the horseshoe to be added.		

Week 2-Regulatory and Human Subjects Training

Activity	Information/Link	Date Completed	Not Applicable
Complete CITI Trainings- these can be accessed from the IRB education webpage • CITI: Basic Human Subjects Training, Biomedical (Group 1) or Social and Behavioral (Group2)	Required for all MUSC investigators and key personnel involved in the design, conduct, or reporting of human subjects research (including exempt research).		
• CITI: Good Clinical Practice (GCP) and ICH	Required for all clinical research investigators and staff.		
Complete the MUSC Overview of Research - Human Subjects Research	This OurDay module reviews what is considered human subjects research, recommended for anyone new to research at MUSC.		
Complete the MUSC Overview of Research - Approvals for Human Subjects Research	This OurDay module reviews the basic approval processes for human subjects research, recommended for anyone new to research at MUSC.		
Register for ACRP eLearning Platform	The South Carolina Clinical and Translational Research (SCTR) Institute has partnered with the Association of Clinical Research Professionals (ACRP) to bring their outstanding training modules to all MUSC staff, students, and faculty free of charge. Follow this link to register and access the ACRP eLearning platform.		
Complete ACRP: Introduction to Clinical Trials	Ideal for all novice clinical researchers, those interested in the profession, or those indirectly involved in clinical trials. This course provides foundational knowledge to further develop competence as a clinical research professional.		
Complete ACRP: Informed Consent Simulation	This interactive, simulation-powered training helps ensure informed consent is obtained by the right subject, with the right forms, by the right people, through the right process, at the right time, and with the right documentation.		

Week 3-Data Management and Other Systems (as appropriate)

Activity	Information/Link	Date Completed	Not Applicable
Review SPARCRequest Training Videos Recommended for new users • High Level Introduction • How to Create a Project & Submit Requests	SPARCRequest is a web-based research transaction management system providing a central portal to browse and request research services and resources. https://sparcrequest.atlassian.net/wiki/spaces/AG/pages/37093447/Training+Videos		
Complete ClinCard Training	ClinCard is a participant remuneration system providing real-time payments through a reloadable debit card. To use ClinCard, training is required and can be accessed through OurDay.		
Setup access and complete Epic Research Training • Epic Research Fundamentals Training	Epic is MUSC's electronic health record (EHR). Epic Research user trainings are required to access the system. Epic Research trainings are located in OurDay.		
• Epic Research Outpatient Orders for Non-Licensed Study Staff	This training is for non-licensed study personnel that need to place orders in Epic for research purposes. Epic Research trainings are located in OurDay.		
Setup REDCap access	REDCap is a secure web platform for building and managing online databases and surveys. The initial login https://redcap.musc.edu, establishes the account. Individuals with an account can be added to existing projects. A brief summary video and Training Resources are available.		

Complete OnCore Access Request and Training	OnCore Clinical Trial Management System (CTMS) has been adopted enterprise-wide by MUSC. Access starts with submitting both a "Contact" and "Training" request via a REDCap ticket.		
Review eReg resource	eReg is MUSC's solution to centralized, compliant, electronic regulatory documentation storage. Consult with your department's regulatory manager to determine access needs.		

Week 4 & beyond (as appropriate)

Activity	Information/Link	Date Completed	Not Applicable
Complete additional suggested ACRP Modules			
ACRP: Investigator Responsibilities	Discusses various responsibilities of clinical investigators based on FDA Guidance for Industry and The International Council for Harmonization of Technical Requirements for Pharmaceuticals for Human Use (ICH) E6 Guideline Regulations.		
ACRP: Ethics & Human Subjects Protection	Provides in-depth training on the history and importance of ethical conduct in clinical trials involving human subjects.		
ACRP: Improving Recruitment, Retention, & Accrual in Clinical Trials	Provides some best practices to help clinical research sites assess how to better communicate with potential participants and how to begin a critical reflection of your own skills and organizational practices to improve recruitment and retention with a focus on operational efficiency, cultural competency, and patient-centeredness.		
Review and become knowledgeable of IRB Policies & Procedures	Suggest focusing on adverse events & protocol deviation policies initially.		
Review and become knowledgeable of MUSC Research Policies & Guidelines	This page contains links to specific policies and guidelines that encompass research at MUSC.		
Register for Core Clinical Research Training (CCRT)	CCRT is an online course providing a comprehensive overview of clinical research for MUSC research personnel.		
Attend Research Professional Network (RPN) Workshops	These are a monthly, peer-led, collaborative virtual workshops focused on topics relevant to clinical research professionals. Participants can receive ACRP or SOCRA credit hours for attending.		
Review and become familiar with research study recruitment resources			
Patient-Outreach Recruitment	MUSC is an opt-out institution with regards to cold-contacting patients for study recruitment purposes. SCTR's Research Preferences Manager is available to discuss the use of patient-outreach recruitment at a protocol level. Select "Patient-Outreach Recruitment Consultation" in SPARCRequest to arrange a consultation.		
Social Media Recruitment	"Research Advertising on Social Media" consultations can be obtained through SPARCRequest and are required for all researchers implementing new paid Facebook ad campaigns for research recruitment.		
SCResearch.org	South Carolina Research Studies Directory is a web-based research studies directory developed by SCTR. Use of this directory is appropriate for any full board, expedited or facilitated research study currently recruiting participants.		
Researchmatch.org	ResearchMatch is funded by the NIH to help connect people interested in research studies with researchers at medical centers across the US.		
Phlebotomy Training	Offered by Lowcountry AHEC, https://lcahec.com/lowcountry-ahec/		

ECG Training	Offered by Lowcountry AHEC, https://lcahec.com/lowcountry-ahec/		
BLS & ACLS Training	Offered through the MUSC Community Training Center		

Supplemental Resources

- MUSC A to Z Index
- MUSC Research
  - MUSC Research Policies & Guidelines
- SCTR
  - SCTR's Getting Started in Research page
  - MUSC Approval Process for Research (MAP-R) is a tool that assists with identifying the regulatory and institutional approvals required prior to starting a research study.
  - ACRP eLearning Platform
  - Lunch and Learns
  - Research Professional Network (RPN) Workshops
  - Research Tools & Links
- MUSC Institutional Review Board
  - MUSC Quality Improvement (QI) Self-Certification tool (login required)- is a tool that assists with determining whether a project may be QI or program evaluation
- MUSC Office of Clinical Research
- MUSC Office of Research Development
  - Funding Portal
- MUSC Office of Research & Sponsored Programs
- MUSC Library

Federal Regulations Involving Human Subjects Research- Link to the code of Federal Regulations (CFR) regarding the Protection of Human Subjects
Federal Guidance for Engagement in Human Subjects Research- Link to the Office for Human Research Protections (OHRP) guidance