

### Clinical Research Onboarding Checklist

Congratulations on joining the clinical research community at UT Southwestern Medical Center!

As part of your onboarding process, we encourage you to use the checklist below to ensure you have fulfilled all institutional requirements prior to commencing research activities at UT Southwestern Medical Center. These training requirements are **specific to research and are required in addition** to the standard institutional onboarding training, which is assigned to all personnel in Taleo Learn.

**Required for all Clinical Research Personnel:**

Type of Training/ Access	Description	Timeframe for Completion
<b>Clinical Research Foundations Training</b>	Information about the Clinical Research Foundations Training can be found on the HRPP (Human Research Protection Program) website: <a href="https://www.utsouthwestern.edu/research/hrpp/training/clinical-research-training/">https://www.utsouthwestern.edu/research/hrpp/training/clinical-research-training/</a>  This training will be completed through the CITI (Collaborative Institutional Training Initiative) Training website.	Within 30 days of hire

**Required for Clinical Research Personnel who will be working on IRB approved research studies:**

Type of Training/Access	Description
<b>eIRB Access</b>	Information about access to eIRB can be found on the HRPP website: <a href="https://www.utsouthwestern.edu/research/hrpp/">https://www.utsouthwestern.edu/research/hrpp/</a>  Access to the eIRB system is requested using the eResearch Access Request Form. Go to the following link and complete the form: <a href="https://ais.swmed.edu/redcap/surveys/?s=UH6mer">https://ais.swmed.edu/redcap/surveys/?s=UH6mer</a> *If you also require access to the Velos system you can request this using the same form. Please confirm this with your supervisor*  Approval for eResearch access takes about 3 business days. You will receive notification from Research and Academic Systems (RAS).
<b>COI Training &amp; Statement of Financial Interest</b>	To complete your COI (Conflict of Interest) training and statements, visit: <a href="https://www.healthstream.com/hlc/utswmc">https://www.healthstream.com/hlc/utswmc</a>  Please visit this website for more information: <a href="https://www.utsouthwestern.edu/research/research-support/conflict-of-interest/">https://www.utsouthwestern.edu/research/research-support/conflict-of-interest/</a>
<b>Regulatory Training</b>	UT Southwestern IRB policy requires all personnel named on UT Southwestern IRB-approved research studies to complete GCP (Good

<p><b>Regulatory Training</b></p>	<p>Clinical Practices), HSP (Human Subjects Protections) and HIPAA (Health Insurance Portability and Accountability) training. NOTE: You cannot be added to a study in eIRB until you have completed this training.</p> <p>Details on how to complete this training can be found at: <a href="https://www.utsouthwestern.edu/research/hrpp/training/">https://www.utsouthwestern.edu/research/hrpp/training/</a></p>
<p><b>Research Credentialing</b></p>	<p>If you have contact with subjects or their personal health information (PHI), you must get UTSW Research Credentialing.</p> <p>After you are added to an IRB study in the eIRB system, please contact <a href="mailto:UTSWResearchCredentialing@UTSouthwestern.edu">UTSWResearchCredentialing@UTSouthwestern.edu</a> for instructions on UTSW credentialing.</p> <p>If you will be working at Parkland or Children’s Health, you may be required to fulfill additional credentialing requirements. For further details please visit the Research Credentialing website: <a href="https://www.utsouthwestern.net/intranet/research/ocr/octm/performing-sites/credentialing.html">https://www.utsouthwestern.net/intranet/research/ocr/octm/performing-sites/credentialing.html</a></p>

**Other role-specific training requirements – please confirm with your supervisor\*\* which of the below are required for your job role:**

Type of Training/Access	Description
<p><b>Velos Access and Training</b></p>	<p>Access to the Velos CTMS (Clinical Trial Management System) is requested using the eResearch Access Form, similar to eIRB access (please see above). This is completed using the following form: <a href="https://ais.swmed.edu/redcap/surveys/?s=UH6mer">https://ais.swmed.edu/redcap/surveys/?s=UH6mer</a></p> <p>To utilize the Velos system, you will be required to complete the following:</p> <ul style="list-style-type: none"> <li>• Velos - Study Registration and eIRB Submission Online Course</li> <li>• Velos - Patient Registration and EPIC Integration Online Course</li> <li>• Velos Status Training</li> </ul> <p>These are accessed through the Taleo learning platform at: <a href="http://utsw.learn.taleo.net/">http://utsw.learn.taleo.net/</a></p>
<p><b>EPIC Access and Training</b></p>	<p>Access to EPIC will be requested by your department; please contact your supervisor. EPIC access will only be granted once you have completed all relevant training.</p> <p><b>All researchers using EPIC must complete:</b></p> <ul style="list-style-type: none"> <li>• EPIC for Research Coordinators</li> </ul> <p><b>Researchers who are required to register and/or schedule patient visits must complete:</b></p> <ul style="list-style-type: none"> <li>• Ambulatory Epic Registration (Prelude)</li> <li>• Ambulatory Epic Scheduling (Cadence)</li> </ul> <p>All these trainings can be accessed through the Taleo learning platform at: <a href="http://utsw.learn.taleo.net/">http://utsw.learn.taleo.net/</a></p>

<p><b>Florence eRegulatory System</b></p>	<p>Access to the Florence eRegulatory System is provided upon completion of your Florence role-specific training.</p> <p>For further details of Florence training requirements and information about requesting access please visit the website: <a href="https://www.utsouthwestern.net/intranet/research/ocr/florence-ebinders/roles-and-training.html">https://www.utsouthwestern.net/intranet/research/ocr/florence-ebinders/roles-and-training.html</a></p>
<p><b>Human Specimen Handling</b></p>	<p>Researchers who are handling human specimens (e.g., cells, blood, urine, etc.) are required to complete the following:</p> <ul style="list-style-type: none"> <li>• Bloodborne Pathogen Training for Healthcare Workers - Clinical</li> <li>• International Air Transport Association (IATA) Initial Course</li> </ul> <p>These trainings can be accessed through the Taleo learning platform at: <a href="https://www.utsouthwestern.net/intranet/services/ace/">https://www.utsouthwestern.net/intranet/services/ace/</a></p>
<p><b>Laboratory Sample Processing</b></p>	<p>Researchers who are processing specimen samples (e.g., cells, blood, urine, etc.) are required to complete the following:</p> <ul style="list-style-type: none"> <li>• Complete Lab Safety Training</li> <li>• Bloodborne Pathogen Training for Healthcare Workers - Clinical</li> <li>• Regulated Medical Waste Training</li> </ul> <p>These trainings can be accessed through the Taleo learning platform at: <a href="http://utsw.learn.taleo.net/">http://utsw.learn.taleo.net/</a></p>
<p><b>Life Support</b></p>	<p>Researchers who have direct patient contact require current life support training. <b>The required type of life support training is dependent on your job description.</b> If your job description indicates you require current Basic Life Support (BLS) certification, then you <u>must</u> complete this. Most clinical research personnel do not require BLS certification and will instead complete Heartsaver/CPR.</p> <p><b>For those personnel that require Heartsaver/CPR:</b> Search “Heartsaver” and register through the Taleo learning platform at: <a href="http://utsw.learn.taleo.net/">http://utsw.learn.taleo.net/</a></p> <p><b>For those personnel that require Basic Life Support:</b> Search “BLS” and register through the Taleo learning platform at: <a href="http://utsw.learn.taleo.net/">http://utsw.learn.taleo.net/</a></p>
<p><b>Clincard Training</b></p>	<p>Researchers who will be involved in participant reimbursement require Clincard Training. Further details about Clincard Training can be found at: <a href="https://www.utsouthwestern.edu/employees/spa/education/clinical-researchers.html">https://www.utsouthwestern.edu/employees/spa/education/clinical-researchers.html</a></p>
<p><b>Ambulatory Skills Training</b></p>	<p>Researchers who will be completing research procedures with patients will require a skills sign-off with the ambulatory team. Sessions are available for:</p> <ul style="list-style-type: none"> <li>• Ambulatory New Hire Orientation</li> <li>• Research Skills Session (Vital Signs &amp; EKG)</li> <li>• Phlebotomy class</li> </ul>

	For further information and to sign up for ambulatory skills sessions please search for the skills session in <a href="#">Taleo</a> , or contact Claudette Waites at: <a href="mailto:Claudette.Waites@UTSouthwestern.edu">Claudette.Waites@UTSouthwestern.edu</a>
<b>OR Observational Training</b>	Researchers required to enter the operating room (OR) at Clements University Hospital (CUH) or Zale for a research study must complete OR observational training.  For class enrollment, complete this form: <a href="https://ais.swmed.edu/redcap/surveys/?s=NHRLXPNTMKP9FXJJ">https://ais.swmed.edu/redcap/surveys/?s=NHRLXPNTMKP9FXJJ</a>

\*\*Your department may have additional training requirements. Please contact your departmental onboarding team to confirm this.

**For queries or further information please contact the Office of Clinical Research:**

Website: <https://www.utsouthwestern.net/intranet/research/ocr/>

Email: [OCR@utsouthwestern.edu](mailto:OCR@utsouthwestern.edu)