120 Day Pediatric Research Coordinator Training Checklist:

(Note: this checklist is also available online at train.mcw.edu)

Pre-Start Date: (leader responsibility)

- Use MCW leader onboarding tool for general MCW on-boarding https://infoscope.mcw.edu/HR-Intranet/Toolboxes/Onboarding-Toolbox.htm
- Obtain Non-employee request for access to CHW applications – access for research purposes only (contact Diane Bauer for form). Submit signed form to Diane Bauer once employee has signed and has an active MCW email and phone number. This will grant CW access and EPIC access. **note this form can be submitted and processed prior to employee start date
- If you need Voalte access: https://connect.chw.org/en/patient-care/provider-resources/telehealth-provider-resources/voalte
- Ensure appropriate Children's badge, key, and pager requests as applicable
- Submit Oracle access request to your Department's Administration for the appropriate Oracle responsibilities required for this role
- Add to appropriate distribution lists and schedule appropriate orientation meetings

Start Date: _____

There is a lot to learn about the research processes at the Medical College of Wisconsin, Versiti and Children's. This is a tool to assist you with some not all key components that help set you up for success! Our goal is to spread this information out over your first 120 days to make it more manageable. However, you may encounter situations that require you to learn certain processes earlier or later than planned. All items on this list are required for new research coordinators.

Critical items – complete within your first 10 days

If new hire, work with your leader to ensure you complete all required new hire training per your organization

- ☐ Review appropriate institutional training/policies. Learn department policies for attendance/scheduling/sick time/holidays.

  CW: Log into CW Citrix and go to Connect to access any of these hyperlinks

  - A complete library of CW Policies and Procedures can be found here: https://pnp.chw.org/Pages/Home.aspx
    - Children's Personal Appearance Policy: Search "Dress Code"
      - https://pnp.chw.org/_layouts/15/WopiFrame.aspx?sourcedoc=/Human%20Resources%20Published/Personal%20Appearance%20(former%20Dress%20Code%20policy).docx&action=default&DefaultItemOpen=1

- Children's Hand Hygiene Policy: Search "Hand Hygiene"
  - https://pnp.chw.org/Patient Care Published1/Hand Hygiene.docx
- Children's Infection Control Policy: Search "Infection Control"
  - https://pnp.chw.org/Infection Control Published/General Infection Prevention-Control.docx

MCW Key Resources

- https://www.mcw.edu/departments/research-resources/onboarding/training
- www.train.mcw.edu

- ☐ ***Complete your CITI and GCP training – note this completion is required before you can begin any support of research studies*** https://www.mcw.edu/departments/human-research-protection-program/Training
- ☐ Gain access to EPIC, relevant databases and shared drives (i.e. Redcap, MCW G-Drive, CHW Q-Drive)
- ☐ Register in IRBNet and eBridge
  - IRBNet: https://irbnet.org/release/index.html
    - Upon registration, discuss with your leader the process for adding yourself to research projects via an amendment in IRBNet.
      - Access to a study within IRBNet (i.e., the study has been shared with you) does not mean that you have been approved as a member of the study personnel.
      - If you wish to be added to a study as an approved member of the study personnel, a staff change amendment package must be submitted via IRBNet. ***Note: You cannot complete any study related activities until you have been approved as a member of the study personnel.***
  - eBridge: http://ebridge.mcw.edu/ebridge/sd/Rooms/DisplayPages/LayoutInitial?Container=com.webridge.entity.Entity[OID[AC482809EC03C442A46F2C8EEC4D75D3
    - Discuss with your leader the eBridge access required for your role. Register in eBridge
      - MCW's platform for the submission, tracking reporting and archive Sponsor Applications including human subjects, animal and biological safety-related research
- ☐ Tour Children's, MCW, Versiti, and clinics you will be working in
  - MCW: https://infoscope.mcw.edu/FileLibrary/Groups/RadiationOncology/documents/Hub-Wayfinding-Brochure.pdf
  - Children's: https://chw.org/patients-and-families/mobile-apps/discover-chw
- ☐ Tour Pediatric TRU on Center 4 South
  - Schedule general TRU training with TRU RN
  - Schedule TRU lab competency verification training if you will need access to the TRU Lab
- ☐ Update your CV and save on appropriate drive for your divisions
- ☐ Learn how your department/division organizes your studies and review protocol and materials (this is an ongoing expectation)
- ☐ Develop a system to organize your inbox, files, certificates, etc.

- ☐ Learn where to locate materials and supplies
- ☐ Learn divisions workflow and expectations for each work day
- ☐ Learn how to navigate Connect.chw.org and infoscope.mcw.edu:
    - Paging
    - Finding policies and procedures
        - Children's: https://pnp.chw.org/Pages/Home.aspx
        - MCW Office of Research P&P's: https://www.mcw.edu/departments/human-research-protection-program/researchers/irb-policies-and-procedures

- ☐ Children's and MCW HRPP page and educational resources https://connect.chw.org/hrpp
- ☐ Contact Jeff Crawford (414-266-7254, jcrawford@chw.org) to set up your EPIC training
- ☐ If you are the solo coordinator in your division, please contact Jeff Crawford Pediatric TRU Research Operations Specialist for assistance identifying a mentor to support you.
- ☐ Ask frequent questions
- ☐ Set up regularly scheduled meetings with your leader

Complete within your first 30 days

- ☐ Introduction to your diseases of focus – begin to learn what you can about the diseases your department/division focuses on (i.e. sickle cell disease, cystic fibrosis, etc.)
- ☐ Introduction to your studies:
    - Review study protocols and consent forms
    - Keep track of questions or concerns as you review these documents. Read them from a patients perspective and again as the person who will be consenting
    - Schedule a 1:1 with each Study PI
    - Dive deeper into each study post meetings and ask questions as they come up
    - Continue to re-read documents regularly
- ☐ Learn department/division procedures for:
    - Quality Assurance processes
    - Daily workflow
    - Screening and logging study information
- ☐ Learn roles of staff in your clinic/work area
- ☐ Begin screening for studies and observe consenting
- ☐ Role play approaching and consenting patients (shadowing the consent process is also encouraged prior to consenting independently)
- ☐ Discuss progress with your leader and/or mentor
- ☐ Sign up for CTSI Bootcamp (goal to attend in your first 3-6 months. https://ctsi.mcw.edu/cto/academy/clinical-research-training-program-bootcamp/

Complete within your first 60 days

- ☐ Sign up for "Introduction to Children's Wisconsin IRB" training session ***by clicking on 'Register Online' under the Educational Offerings tab via*** https://childrenswi.org/medical-professionals/research/human-research-protection-program/education-and-training

- Review policies and instructions for submitting studies, amendments, etc. at MCW in eBridge if necessary: https://www.mcw.edu/departments/human-research-protection-program/researchers/smartform-instructions
- Assess what other trainings you may need to register for with your leader (i.e. Shipping, banking, etc.) and sign up to complete these
- Continue with department specific training
- Continue to regularly review your research studies
- Learn about consortiums or sponsors of interest for your department/division
- Continue with in-depth study overview and ongoing training
- Complete research administrative tasks with increased autonomy (i.e. phone calls, appointment scheduling, screening logs, etc.)
- Begin consenting independently based upon mentors guidance
- Learn SAE and AE reporting
- Discuss progress with your leader and/or mentor
- Consider setting up time with TRU staff to learn about how to start up a study in the TRU

Complete within your first 120 days

- Attend Boot Camp
- Discuss progress with your leader or Research Mentor
- Master study administrative tasks
- Review relevant HRPP policies and procedures (see links above)
- Schedule time with Diane Bauer – Children's Wisconsin Research Compliance to learn processes
- Discuss progress and develop timeline for future support with your leader and/or mentor
- Establish goals with leader and continue with frequent check-ins
- Seek regular feedback
- Frequently useful websites (Log into: CW Citrix and go to connect):
    - Children's P&P's: https://pnp.chw.org/Pages/Home.aspx
    - Essential Resources Contact List https://connect.chw.org/departments-services/clinical-departments/childrens-research-institute/human-research-protection/guidance-resources - select Institutional Contacts link