Education and Operations Subcommittee:
Standard Training Checklist Template

Onboarding:	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Employee Badge	1-week before start	AK
Parking	1-week before start	N/A
Benefits enrollment	1-week before start	AK
Orientation (HR, employee health, IT)	Day one	AK
Staff Respectful Workplace	Day one	AK
Tour of Facilities	Day one	N/A
Meet with team members	Day one	AK
The review process for clocking in/out and submitting Paid Time Off (PTO) requests	Day one	AK
Receive departmental contact lists	Day one	AK
W4 and Direct deposit forms	Day one	AK
Staff Handbook acknowledgment	Day one	AK
Door Access/Codes	Day one	AK
Added staff to all mandatory meeting invitations	First week	N/A
Added to share drives, Microsoft Teams, Intranet Access	First Week	N/A
Review of frequently used websites and resources	First Week	N/A
Telephone/Voicemail setup	First week	N/A
Standard Operating Procedures	1-2 weeks	AK
Corrective/preventative Action Plans	First month	AK

Mandatory Training	**Suggested Timeline**	**Provide requirements for observations (OBS), acknowledgment (AK), or return demonstrations (RD. Use Non-applicable (N/A) if needed.**
COVID-19 Hygiene Best Practices	1-2 weeks	
Bloodborne Pathogens Training	1-2 weeks	AK
Fire/Life Safety	1-2 weeks	
How to report information to regulatory authorities	1-2 weeks	
HIPAA/Protecting Patient Privacy	1-2 weeks	
Biosafety standards	1-2 weeks	
Harassment Prevention for non-Supervisors	1-2 weeks	
Chemical Safety	1-2 weeks	
Hazardous Communications	1-2 weeks	
Hazardous Drugs Spill Clean Up	1-2 weeks	
Safety Documentation and Reporting	1-2 weeks	
Diversity and Inclusion	1-2 weeks	
Emergency preparedness	1-2 weeks	
HIPAA Privacy for Researchers	1-month	

Basic medical terminology training/Common research terminology	1-month	
Acronym List	1-month	
State and Country Specific Regulations	1-month	
Shipping Biological Materials	1-month	
Good Documentation Practices	1-month	
Adverse Events: Identify, Document, Report	1-month	
Introduction to Informed Consent	1-month	
The Informed Consent Process	1-month	
Informed Consent, remote or eConsent	1-month	
Health System Violence Awareness Training and Armed and Dangerous Training	1-month	
Food and Drug Administration (FDA) Regulations and Guidance	1-month	
How to Read a Research Protocol	1-month	
Unconscious Bias Training	1-month	
Shipping Training	1-3 months	
Study Financial Management	1-3 months	
Research Budgeting	1-3 months	
Coverage Analysis	1-3 months	
IRB eProtocol Training	1-3 months	
General and Institutional Review Board (IRB) Reporting Requirements	1-3 months	
Ethics and Clinical Research	1-3 months	
Cancer Education 101	1-3 months	
Cheson/Lugano, IMWG, iwCLL, RANO etc. as applicable		
RECIST Response Evaluation Criteria in Solid Tumors (RECIST)	1-3 months	
Clinical Research 101	1-3 months	
The Revised Common Rule for Human Subjects' Protections	1-3 months	
Responsible Research Conduct	1-3 months	
General Research Safety Training	1-3 months	
Privacy for Research	1-3 months	
Conflict of Interest (COI)	1-3 months	
Environment of Care (Setting of Care)	1-3 months	
Infection Control for Non-clinical Staff	1-3 months	
Time-out Training Module	1-3 months	
Tuberculosis (TB) Training	1-3 months	
21st Century Cures Act	1-3 months	
Compliance Annual Update	1-3 months	
Prepare For an External Audit	1-3 months	
Biospecimens 101	1-3 months	
Regulatory Binder 101	1-3 months	
Working with sponsors and Site Monitors	1-3 months	
Understanding Protocol Deviations and Waivers	1-3 months	
Intro to Root Cause Analysis	1-3 months	

Cancer Statics Training - Surveillance, Epidemiology, and End Results Program (SEER)	1-3 months	
Source documentation examples and review process	1-3 months	
FDA Investigational New Drug Applications (IND) vs. IND- Exempt Trials and Sponsor-Investigator Responsibilities	1-3 months	
Phase 1 Trial Design	1-3 months	
Clinical Research Inspections and Audits	1-3 months	
FDA Inspection Process	1-3 months	
Human Subjects Research Recordkeeping and Record Retention	1-3 months	
Basic Life Support Training	1-3 months	
Phlebotomy Training	1-3 months	
EKG & Vital Sign Training	1-3 months	
Patient Payment or Reimbursement	1-3 months	
Understanding Delegation of Authority Logs	1-3 months	
Form FDA 1572	1-3 months	

Computer Systems	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD. Use Non-applicable (N/A) if needed.**
Collaborative Institutional Training Initiative (CITI) Human Subjects Research Protection	1-3 months	
CITI Good Clinical Practice (GCP)	1-3 months	
CITI modules (Biomedical research with (GCP) - basic/refresher, vulnerable subjects- research involving children/prisoners/pregnant women, fetuses, and neonates)	1-3 months	
National Cancer Institute (NCI) Cancer Therapy Evaluation Program (CTEP) Registration NIH/NCI RCR website	1-3 months	
Clinical and Translational Science Institute (CTSI) Training Modules via Healthstream	1-3 months	
International Air Transport Association (IATA) Training for shipping hazardous and biological samples via Air transport via Healthstream or CITI	1-3 months	
Clinical Trial Management Application Training for clinical research coordinators, e.g., OnCore, RedCap, Velos, or homegrown systems, etc. (Account setup and navigation)	1-3 months	
Sharepoint Site Access	1-3 months	
Web based integrated laboratory systems (iLab)	1-3 months	
Portal Access: VPN and RSA Token-via Service Portal	1-3 months	

RedCap Introductory videos and In-person training	1-3 months	
NCI Registration and Credential Repository (RCR)	1-3 months	
NCI Clinical Trial Reporting Program	1-3 months	
Health System Electronic Patient Record (EPR)/ Electronic Medical Record (EMR) Trainings, e.g., EPIC, O2, etc.	1-3 months	
Virtual Clinical Research Visits	1-3 months	
Oncology Patient Information System (OPIS)	1-3 months	
Coordinated Approval Process for Clinical Research (CAPCR) System Overview	1-3 months	
Ontario Cancer Research Ethics Board (OCREB) (OCREB) Clinical Trials Office (CTO) Stream	1-3 months	
Cancer staging online application	1-3 months	
eRegulatory Platform Training, e.g., Complion, Florence, Velos, OnCore, home grown systems)	1-3 months	
DocuSign	1-3 months	
Shared Investigator Platform (SIP)	1-3 months	
O2 (an electronic medical record for patients)	1-3 months	
Helix	1-3 months	

Lists of "Firsts"

As a new employee, it is essential that there be a mentorship bridge between what you have been taught in training and the first time you do some critical tasks in your position. Tasks depending on roles:

All Roles	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Meet with Clinical Research Manager	Week 1	
Electronic medical record (EMR) navigation	Week 2	
Meet with other teams (regulatory, research coordinator, data, finance, etc.)	Weeks 2-4	
Shadow team member to see routines and workflow	Weeks 2-8	
Understanding individual department meetings/workflows	Weeks 2-8	
Deviations	Month 1-3	
Serious Adverse Event (SAE) reporting and follow-up	Month 1-3	
Complete institutional forms/processes	Month 1-3	
Sign Delegation of Authority logs	Month 1-3	
ALCOA documentation practices	Month 1-3	
Review cancer care documents cancer.org/NCCN guidelines	Month 1-3	

Clinical Research Coordinator	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Identifying recruitment screening eligibility consenting	Month 1-3	
Treat a patient (vital signs, study tests, etc.)	Month 1-3	
Study visits essentials (Place orders for study specific tests in EMR, Create visit note, Schedule patient, Patient Reimbursement, etc.)	Month 1-3	
Review on-study/off-study source documentation	Month 1-3	
Reviewing AEs	Month 1-3	
Annual continuing review at the IRB (answering questions from regulatory)	Month 1-3	
Specimen processing request	Month 1-3	
Treatment plan approval	Month 1-3	
Review of a billing grid	Month 1-3	
Set up Site Initiation Visit	Month 1-3	
Monitor visit PI meeting	Month 1-3	

Research Data Coordinator	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Medical history review/CON medication review	Month 1-3	

Medical terminology review	Month 1-3	
Meet monitors/sponsor contacts (for industry trial/IIT)	Month 1-3	
Monitor visits	Month 1-3	
Review protocol and identify EDC needs	Month 1-3	
Archival pathology request	Month 1-3	
Redact and upload scan images	Month 1-3	
Source documentation – EMR & paper	Month 1-3	
Abstract data from source documents	Month 1-3	

Regulatory	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Review IRB approval notifications	Month 1-3	
Amendment notifications	Month 1-3	
Continuing IRB review (inquiries, clarifications, etc.)	Month 1-3	
Study termination	Month 1-3	
Notes to file	Month 1-3	
Delegation log is updated and complete	Month 1-3	
Regulatory binder is accurate	Month 1-3	
Protocol training/GCP certifications/credentialing	Month 1-3	
Archiving	Month 1-3	
Audit and monitoring overview	Month 2-4	
Informed consent creation	Month 2-4	

Financial Management	**Suggested Timeline:**	**Provide requirements for observations (OBS), acknowledgement (AK), or return demonstrations (RD). Use Non-applicable (N/A) if needed.**
Review budget/budget templates	Month 1-3	
Develop budget to cover all study-related costs	Month 1-3	
Meet sponsor contacts for negotiating fees	Month 1-3	
Review therapeutic intent	Month 1-3	
Perform accurate analysis to check qualification	Month 1-3	
Identify services/items paid to insurance/MCA	Month 1-3	
Learn difference from current accounts to aged accounts	Month 1-3	
Review deposits/payments/invoice status	Month 1-3	
Generate expense report	Month 1-3	
Study startup	Month 1-3	
Processing amendments or modifications that affect budget/contract	Month 1-3	
Submit IITs to clinicaltrials.gov & ctrp.gov	Month 1-3	