



ORIENTATION CHECKLIST FOR Clinical Research Coordinators and Research Assistants

Welcome to the University of Florida! This checklist may assist as a guide for new clinical research coordinators and research assistants however, it may not be inclusive of all training requirements which may vary based on research study, department or Principal Investigator. Please review the checklist with your supervisor to verify all the necessary training required for your position. Enter the completion date for each item. The form is designed so that supervisors can perform a check-off and enter the checkoff date and their initials in the appropriate column. Please confirm required training timelines.

Staff Name: _____ **Trainer:** _____
Position: _____ **Supervisor:** _____

| Hiring Requirements | Date Completed | Trainer/ Supervisor Check-Off |
|---|----------------|-------------------------------------|
| <p>Background Clearance: Make an appointment here https://booknow.appointment-plus.com/7ryk7y2x/. On Select Service, please select “FBI Live Scan”. On Select Staff Member, please select Birdella Williams.</p> | | |
| <p>Medical Clearance: Make an appointment at the Student Health Care Clinic to complete the medical clearance. Please make an appointment by calling 352-294-5700 and then follow the instructions below.</p> <ul style="list-style-type: none"> • Please complete and bring the following forms to your appointment (if you do not bring forms with you, your appointment will be rescheduled): <ul style="list-style-type: none"> ○ Preplacement Screening Patient Contact Form ○ Respirator Medical History Questionnaire ○ Tuberculosis (TB) Surveillance Form ○ Training and Vaccination Form Acceptance/Declination Statement • Please bring any available Immunization records and list of medications, if any. • Please arrive 30 minutes prior to scheduled appointment time w/ completed forms. <ul style="list-style-type: none"> ○ Please note: You will be rescheduled if you do not arrive a minimum of 30 minutes prior to your scheduled appointment time and/or paperwork is not completed • Parking is available in the West Visitor Parking garage located off of Center Drive. <ul style="list-style-type: none"> ○ If you are driving, please ask our front desk staff for a “free parking” pass for the garage <p>Click here for directions to clinic.</p> | | |

**ORIENTATION CHECKLIST FOR
Clinical Research Coordinators and Research Assistants**

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| <p>Email: To begin the process, you will receive an email from “gatorstart@ufl.edu” providing you log-in instructions to access the GatorStart portal. The login ID and password will be provided in this email and it will be different from your Gatorlink account information.</p> | | |
| <p align="center">Hiring Requirements (before hiring)</p> | <p align="center">Date Completed</p> | <p align="center">Trainer/ Supervisor Check-Off</p> |
| <p>Once you log in, it will take you approximately 10 to 15 minutes to complete your electronic hiring documents. The GatorStart packet must be completed on or before your first day of employment. This packet must be completed on or before the first day of employment to comply with U.S. federal statute and to ensure you receive your first paycheck in a timely manner.</p> <p>Please note, your onboarding packet will expire within 45 days of creation and may no longer be available in your GatorStart portal. If you have any difficulty with the onboarding process or if you have not received instructions via email, please contact your hiring department. For any additional questions, email the Office of Human Resource Services at ufhr-employment@ufl.edu.</p> | | |
| <p>Documents: After completing your GatorStart packet, you must show original documents establishing your eligibility to work in the U.S. to your hiring department within 3 business days following your first day of employment. As a new employee, you can select the documents you present to establish your identity and work authorization from the Lists of Acceptable Documents. Be sure to contact your hiring department to verify no additional documents are needed to complete your onboarding process</p> | | |
| <p>Health Assessment and Training & Vaccination Form: Acceptance/Declination Statement (this was provided in the welcome email you received from HR and must be signed by your direct manager)</p> | | |
| <p align="center">Welcome!</p> | | |
| <p>UF Access: Obtain your Gator 1 ID badge and UF ID number (you will do this as part of your day one orientation with your department’s HR Manager or administrator.) Register online with your UF ID number for your Gatorlink account in order to access myUFL, PeopleSoft and email. Log-on to MyUFL to fill out your W-4, and sign-up for direct deposit. Direct deposit is required.</p> | | |
| <p>Orientation: For a list of orientations offered at UFL please go to the following link: https://welcome.hr.ufl.edu/getting-started/orientation/</p> | | |

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| Obtain Parking Permit: https://parking.ufl.edu | | |
| Tour of office space including: <ul style="list-style-type: none"> • Location of essential facilities (break areas, kitchen, rest rooms, etc.) • Office organization (files, supplies, supply orders, etc.) • Office resources (copy machine, fax, printers etc.) • Conference rooms | | |
| Confirm general computer access: <ul style="list-style-type: none"> • Log on to network • Outlook email • UFHCC Share Drive • SharePoint • Epic • REDCap | | |
| Research Listservs | Date Completed | Trainer/ Supervisor Check-Off |
| Join Clinical Research Coordinator ListServ (clinicalresearchcoor-L@lists.ufl.edu) Email Robert Kolb (CTSI) at kolbhr@ufl.edu | | |
| Join IRB-01 ListServ Email listserv@lists.ufl.edu (type in: subscribe IRBMAIL-L) | | |
| All Employee Required Training | | |
| Review process for disposal of paper with protected health information (PHI) | | |
| UF New Employee Orientation (NEO100 and NEO200) myUFL > My Self Service > Training and Development > myTraining | | |
| Sexual Harassment Prevention Training, (GET803) myUFL > My Self Service > Training and Development > myTraining | | |
| Maintaining a Safe and Respectful Campus: (GET803v) myUFL > My Self Service > Training and Development > myTraining | | |
| Hospitality Training: (required within 30 days of hire) <ul style="list-style-type: none"> • In person training held every Monday morning (or on Tuesday if Monday is a holiday) from 8:00am -11:45am at the Facilities Administration Bldg., (FAB) (next to Children’s Hospital) in Education Center 1 & 2. • To register, send an email to hrd@shands.ufl.edu with the following information: <ul style="list-style-type: none"> ○ Full legal name ○ UFID# ○ Department ○ Job Title ○ Date of Hire ○ Date of training you would like to attend | | |

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| Required for Clinical Personnel: 2020 Infection Prevention Training-Update based on CoVID-19 Pandemic myUFL > My Self Service > Training and Development > myTraining | | |
| IRB Requirements | | |
| HIPAA & Privacy-General Awareness –Research (PRV800). myUFL > My Self Service > Training and Development | | |
| Confidentiality Statement (required on first day) http://privacy.ufl.edu/uf-health-privacy/confidentiality-statement/ Complete Steps 1 and 2 | | |
| Human Subjects (RBC810): myUFL > My Self Service > Training and Development | | |
| IRB Training (IRB803): myUFL > My Self Service > Training and Development | | |
| | Date Completed | Trainer/ Supervisor Check-Off |
| CITI Good Clinical Practice (GCP) Training: myUFL > My Self Service > Training and Development > CITI Training > Agree to Continue to CITI > Click on Main Menu > Select UF Courses > Under My Learner Tools for UF select Add a Course > scroll down to Q5 > select CITI Good Clinical Practice Course > Submit. Once completed Please email the following to ufirb-l@lists.ufl.edu : (a) Your full name (no nicknames) (b) Your UFID # (c) A copy of the actual GCP completion certificate | | |
| My IRB Registration: https://my.irb.ufl.edu/ (click Login to Register) | | |
| Clinical Research Training | | |
| OnCore Training: OnCore Basics (OCR800): myUFL > My Self Service > Training and Development | | |
| CRC Only: OnCore Training: OnCore Protocol Coordination (OCR801) myUFL > My Self Service > Training and Development | | |
| CRC Only: OnCore Training: OnCore Subject Administration (OCR803) myUFL > My Self Service > Training and Development | | |
| CRC Only: OnCore Invoicing and Accounts Receivable (OCR804) myUFL > My Self Service > Training and Development | | |
| CRC Only: OnCore Financial Coordination (OCR802) myUFL > My Self Service > Training and Development | | |

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| CRC Only: CTSI Informed Consent Training (CTS800): myUFL > My Self Service > Training and Development > myTraining | | |
| Additional Training As Needed | | |
| FERPA Basics (PRV802): myUFL > My Self Service > Training and Development > myTraining | | |
| Protecting Social Security Numbers and Identity Theft Prevention (PRV804): myUFL > My Self Service > Training and Development > myTraining | | |
| CPR Certification, Every 2 Years: Anyone working in the healthcare setting (both research and clinical) need to have this certification. | | |
| Blood borne Pathogen/Infection Control and Biomedical Waste Training (EHS850G): myUFL > My Self Service > Training and Development > myTraining | | |
| Shipping and Transport of Biological Materials Training (EHS841) http://www.ehs.ufl.edu/programs/bio/shipping/ | | |
| Human Subject Payment Training (UF_RSH320_OLT) myUFL > My Self Service > Training and Development > myTraining | | |
| Benefits | Date Completed | Trainer/ Supervisor Check-Off |
| <p><u>BENEFITS</u></p> <p>You have 60 calendar days from your hire date to enroll in state and UF Benefits Plans. This is a strict deadline, there is no grace period. If you do not enroll in benefits by the last day of your month of hire, your insurance will not be effective until the beginning of the next month after you enroll. For example, if you are hired 9/16/17 and you enroll in benefits by 9/30/17, your insurance will be effective 10/1/17. If you don't enroll until 10/1/17, your insurance will not become effective until 11/1/17.</p> <p>Enrollment time limit, please confirm with HR.</p> | | |
| <p><u>RETIREMENT</u></p> <p>For TEAMS exempt (salaried) employees: Enrollment time limit, please confirm with HR. More information about ORP and enrollment procedures can be found on the HRS website: ORP</p> <p>For TEAMS non-exempt (hourly) employees:</p> | | |



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| Enrollment time limit, please confirm with HR. More information can be found here: Choose My FRS Plan | | |
| Other Required Tasks | Date Completed | Trainer/ Supervisor Check-Off |
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