UCSF
University of California
San Francisco

Suggested Training Checklist for Clinical Research Coordination at UCSF

#	Topic	Resource	Notes	Certificate or Documented	Approx. time to complete (min)	Date Completed
	Onboarding Tasks (To be Verified by Supervisor)					
1	**Occupational Health Screening**	https://occupationalhealthprogram.ucsf.edu/home	You or your supervisor must make an appointment to have health screening clearance prior to patient exposure*	Y		
2	**Add CRC to study in iRIS**	Add to IRB applications (in IRIS) after CITI HST & GCP	https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/Personnel%20Form%20Instructions_Campus_0917.pdf	Y		
3	**Add CRC to study in OnCore** ***(if applicable)***	OnCore (oncore@ucsf.edu)	https://ucsf.co1.qualtrics.com/jfe/form/SV_0HeVakMRjbdTisZ	Y		
4	**Add CRC to study in APeX** ***(if applicable)***	APEX account access (UCSF Medical Center AD Network log-on) using an ARF & then add to study builds	https://ucsf.service-now.com/ucsfit?id=ucsf_index	Y		
5	**Add CRC to study documents**	Add to delegation log-in regulatory binder & document training	Be sure all studies track staff responsibilities & training	Y		
6	**Subscribe to CRC ListServ**	https://irb.ucsf.edu/clinical-research-coordinators-council#listserv	Also contact department/division admin for other distribution lists	Y		
	New Hire & Onboarding Resources (Recommended Week 1-2)					
7	**HIPAA 101**	https://training.ucsf.edu	HIPAA 101 - Privacy & Security for New UCSF Faculty, Staff, Trainees, Students & Volunteers (1.4)	Y	30	
8	**HIPAA & Data Security for Researchers (IRB)**	https://irb.ucsf.edu/hipaa	https://irb.ucsf.edu/electronic-data-security		60	
9	**CITI Human Subjects Training (HST)**	http://irb.ucsf.edu/citi-human-subjects-training	Required training for all human research studies	Y	90	
10	**CITI Good Clinical Practice (GCP)**	https://www.citiprogram.org	Good Clinical Practice training is usually optional but highly recommended	Y	360	
11	**IRIS Training (IRB)**	https://iris-help.ucsf.edu/irb-iris	IRB training videos for online application system		60	
12	**Infection Prevention Training**	https://training.ucsf.edu	Infection Control Training for Ancillary Staff (via UC Learning)	Y	30	
13	**Bloodborne Pathogen Training**	https://training.ucsf.edu	Bloodborne Pathogens (Campus) for anyone who handles human specimens (UC Learning)	Y	45	
14	**Annual Safety Training (UC Learning)**	https://training.ucsf.edu	Annual Safety Training for Staff	Y	30	
15	**Safe Shipping**	https://training.ucsf.edu	Safe Shipping of Biohazards/Dry Ice (via UC Learning)	Y	30	
16	**APeX CRC Training**	https://ucsf.co1.qualtrics.com/jfe/form/SV_1zEfDDgiZ4zP7Ce	First get an APeX account (Med Ctr ARF) then sign up for 2 trainings: 1 online & 1 instructor led*	Y	240	
17	**OnCore**	https://trialactivation.ucsf.edu/oncore-account-creation-training	Complete Intro course on UC Learning to request access or email oncore@ucsf.edu	Y	120	
	Core Training: CRC Foundations (Recommended Weeks 2-6)					
18	**CTO 100 Orientation**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training	Sign up via UC Learning & allocate time to take all instructor led courses (offered via ZOOM)	Y	150	
19	**CTO 101 Informed Consent**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training		Y	150	
20	**CTO 102 IRB & Safety Reporting**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training		Y	150	
21	**CTO 103a Pre & Post Award Tasks**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training		Y	180	
22	**CTO 107 Clinical Research Systems**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training		Y	120	
23	**CTO 104 Effective Communications**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training		Y	150	
24	**CTO 106 Data Management**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training	Offered on demand via UC Learning starting 11/2023	Y	90	
	Supplemental or Advanced Training Resources for CRCs					
25	**CTO 105 Investigational New Device**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training	Offered on demand via UC Learning	Y	60	
26	**CTO 201 Audit Readiness**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training	Sign up & allocate time to take instructor led courses (offered via ZOOM)	Y	180	
27	**CTO 202 Protocal Training, MOPs & SOPs**	https://ctsi.ucsf.edu/programs/clinical-trials-operations/training	Sign up & allocate time to take instructor led courses (offered via ZOOM)	Y	120	

** This training may have location specific requirements (for example at ZSFG they have unique onboarding & EPIC access)*
For any questions about this list, please email cto@ucsf.edu

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Additional Resources

#	Topic	Resource	Notes	Date Completed
	Additional Reccomended Resources for Newly Hired Clinical Research Staff			
1	**Review IRB Website**	https://irb.ucsf.edu	Institutional Review Board (IRB); previously known as 'CHR'; selected links below	
2	**Review The HUB Website**	http://hub.ucsf.edu	Clinical Research Resource HUB (lots of info for CRCs)	
3	**APEX CRC Knowledge Bank**	http://myapex.ucsf.edu/researchcrc	Many updates & tools for APeX research users	
4	**HIPAA & Data Security for Researchers (IRB)**	https://irb.ucsf.edu/hipaa	https://irb.ucsf.edu/electronic-data-security	
5	**Role of the CRC (IRB)**	http://irb.ucsf.edu/responsibilities-pis-and-crcs	Summary of the responsibilities of the PI & CRC	
6	**Informed Consent Info (IRB)**	http://irb.ucsf.edu/obtaining-and-documenting-informed-consent	IRB guidance on the informed consent process	
	Research Integrity Training	http://ori.hhs.gov/TheResearchClinic	Entertaining interactive video for training research staff	
7	**Introduction to The Regulatory Binder (HUB)**	https://hub.ucsf.edu/virtual-regulatory-binder	Guidance on creation & maintaining essential documents	
8	**Research Tools & Enrollment Logs (IRB)**	http://irb.ucsf.edu/research-tools-and-checklists	Templates for study logs & other study tools	
9	**Amendments & Version Control (IRB)**	http://irb.ucsf.edu/modification	Guidance regarding protocol amendments & modification applications	
10	**Study Start-up Checklist (HUB)**	https://hub.ucsf.edu/clinical-research/setup-study	Steps to begin new clinical from receipt of protcol to enrollment of 1st subject	
11	**Budgets & Coverage Analysis (HUB)**	http://hub.ucsf.edu/ca-budget-billing	Describes the importance of compliant clinical research billing practices	
12	**Post-approval Reporting Summary (IRB)**	https://irb.ucsf.edu/sites/hrpp.ucsf.edu/files/post-approval-reporting-summary-sheet-%20%286-1-20%29.pdf	A summary sheet of all AE/SAE, safety, new IB, DSMB, protocol incident & violation reporting	
13	**Participant incentive policies (IRB)**	http://irb.ucsf.edu/research-subject-payments	Guidance regarding subject payments	
14	**Policies for Petty Cash Handlers (UCLearning)**	https://training.ucsf.edu	Useful if you handle cash or gift cards for research participants	
15	**Subject Injury Program**	http://irb.ucsf.edu/treatment-and-compensation-injury	Policy on reporting subject injury (adverse events that occur as a result of study participation)	
16	**Recruitment (IRB & HUB)**	http://irb.ucsf.edu/recruitment	https://recruit.ucsf.edu	
17	**IDS Pharmacy Information**	http://ids.ucsf.edu	Log-in using your MyAccess account	
	Protocol Development (HUB)	https://hub.ucsf.edu/protocol-development	Basic information about protocol organization & development	
18	**CRS Procedures & Budget Estimate**	https://accelerate.ucsf.edu/research/crs	For studies that use CRS, PCRC or other CTSI services (look up by location)	
19	**ZSFG Research Resources & Protocol Application**	https://zsfg.ucsf.edu/research-zsfg	For ZSFG studies	

For any questions about this list, please email: cto@ucsf.edu