Category: Training and Quality Assurance – Completed Project

Research Staff Orientation and Training

M. Horak, D. Cleary, B. Pappu

UPMC Hillman Cancer Center

1. Background

Staff turnover, hiring, and onboarding is a timely and costly process. Common complaints during staff exit interviews included a lack of a structured and detailed orientation process. With the prior process, new staff were assigned a mentor and began hands-on training immediately, without an introduction to research concepts and processes. This led to staff confusion and dissatisfaction with the training process. Additionally, the training process was not well supervised, and it was difficult to ensure that new staff were meeting all expectations.

2. Goals

The goal of the updated orientation and training process was to help improve new staff training and satisfaction.

3. Solutions and Methods

New staff training now includes a thirteen-day orientation period with the Quality, Education, and Compliance (QA) team to learn basic research principles prior to training with a mentor in an assigned disease center. Each day of the thirteen-day orientation period includes one-on-one training regarding specific components of the research process. The intent is to give an overview of the start-to-finish research process. Each day of the orientation builds on content reviewed during prior trainings. Trainees are given PowerPoint presentations of material that outline processes which are used as reference once off orientation and mentorship.

Companion *Skills Lab* are completed by the trainees for the topics reviewed with the QA team. The Skills Labs are formatted as either a quiz or are a task-based exercise related to the material and topics reviewed. Once the initial thirteen-day orientation is completed, the trainees begin training directly with an assigned mentor in a specific disease center for 10 weeks. “Touch Base Meetings” are held biweekly for 12 weeks from the initial start date with the trainees, manager/supervisor, and mentor with a QA team member to facilitate. The trainee’s experiences are reviewed, and goals are set for the next weeks.

An “Orientation Checklist” is used to track training during the QA Orientation. A “Skills Checklist” is used to track experiences during the mentorship and is signed off by the mentor and trainee as skills and tasks are completed. The Skills Checklist is reviewed during the Touch Base Meetings to ensure compliance with the process and to ensure trainees are meeting expectations.

4. Outcomes

The improved orientation and training process has increased staff satisfaction. The trainees feel more supported and have a better understanding of the research process prior to training with a mentor. Additionally, mentor satisfaction has increased as they have noted that the trainees learn the job faster.

The mentors also feel that they do not have to spend as much time teaching the trainees research concepts, as they have already reviewed the concepts with the QA team.

5. Lessons Learned

The Clinical Research Services leadership continues to review the orientation and training process for effectiveness. The training and orientation documents are updated in real time to reflect changes to processes. The next steps include a mentor training program to ensure all mentors are training staff in the same manner. We are also working to implement standard “refresher” training courses which will be available to all staff.