

Remote Onboarding and Training in the Clinical Trials Office

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1. Background

The COVID-19 pandemic has led to our clinical operations staff to have to work remotely with a rotating in-office schedule. This created a challenge to onboarding and training new coordinators as social distancing posed a barrier to one-on-one training. Our rotating schedules, and the cessation of in-person meetings, made it difficult to assess how a new hire was progressing through the tasks they would need to execute on their own. We also needed to track the transfer of study subjects from one coordinator to the next. It was apparent that we needed a way to collaboratively share and document information between trainers and trainees regarding job expectations.

2. Goals

A primary goal was to be able to remotely monitor the progress of trainees towards full job competency. We desired to place the trainee in control of deciding when they felt a task had been completed and they were confident to move forward on their own. We also wanted a task tracker that would allow the trainer to assign a due date or priority score to each task requiring mastery. Finally, we wanted a document that could provide resources to the new employee as they moved on to solo work by incorporating links to important task related information they could access in the future.

3. Solutions and Methods

We decided to implement cloud-based lists of job-related tasks and resources, tailored to different job roles, using Google Sheets. This shared document was beneficial in that it was available to multiple users at a time and could be accessed from anywhere as long as the user had internet service. This process was first developed for the data coordinators and included tasks with links or instructions for new employees to register for trainings, create accounts, and included the different types of interoffice meetings required by the role. (See figure.)

4. Outcomes

The implementation of the training checklist has streamlined the onboarding process and provided an organizational tool for our supervisors. We have created five variations of the checklist to accommodate our different clinical operations positions and have received positive reactions from the employees that have used this system. They have provided feedback that the checklist helped achieve an effective and efficient transition and it was clear what was expected of them, how urgently it should be accomplished, and the resources necessary. Our supervisors have appreciated having checklists that are specific to the job each new coordinator will take on and provide reassurance that nothing is being forgotten.

5. Lessons Learned

The clinical operations team in our office has successfully implemented a remote training platform using Google Sheets to communicate and monitor training tasks. We continue to improve the system and make individualized updates with every hire. Next steps for are to expand this program to other units in the clinical trials office in hopes that it can be adapted to improve training on standard operating procedures, and to include roles in regulatory and finance.

Figure:

New Hire Checklist- DC			
✓ <input type="checkbox"/>	Priority Score	Task	Resource/Trainer
<input type="checkbox"/>		OnCore Access	https://uic-oncore-prod.forteresearchapps.com/forte-platform-web/login
<input type="checkbox"/>		Password Keeper	Personal Choice- Need a method to track stufy specific login information
<input type="checkbox"/>		Slope Account/ Use	https://app.slope.io/users/sign_in
<input type="checkbox"/>		Epic Access/Hospital ID	Meredith
<input type="checkbox"/>		iLab-RRC account set-up	https://rrc.uic.edu/get-started/user-registration/lab-member-registration/
<input type="checkbox"/>		Enroll in EPIC Training	Meredith
<input type="checkbox"/>		Google Calendars	Meredith
<input type="checkbox"/>		IATA Training	https://ehso.uic.edu/training/shipping-hazardous-materials-training/
<input type="checkbox"/>		BBP Training- EHSO	https://ehso.uic.edu/training/bloodborne-pathogen-training-schedule/