

Creating and Implementing an Introduction to Clinic Module for New Clinical Research Staff

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1. Background

OHSU Knight Cancer Institute utilizes two trainers to provide clinical research-specific onboarding to new staff. They cover a total of 45 topics related to research operations and processes involved in coordination, data management, and regulatory work starting with 11 Foundational Training topics then moving toward more complex concepts. However, as new clinical research coordinators (CRCs) begin working on protocols and with patients, it is up to the study teams to introduce CRCs to the ins and outs of how the clinic and infusion unit function on a day-to-day basis, potentially leading to inconsistencies across study teams.

2. Goals

1. Reduce burden on study teams and create a standardized introduction to clinic/infusion units
2. Set staff up for success by identifying their scope of work
3. Foster collaboration and engagement between disease teams and the clinic/infusion units

3. Solutions and Methods

In the beginning of 2025, the clinical research trainers met with the nurse manager for the Research Unit and a Research Advisory Panel (made up of six to eight infusion nurses who work in the research-specific unit) to discuss research education for infusion unit staff. Together, they started developing an “Intro to Clinic” training module.

After receiving buy-in from leadership, the research program managers nominated seasoned clinical researchers from various research programs (a total of six staff, including CRCs and supervisors) to collaborate on the Intro to Clinic project along with the clinical research trainers and the nurse manager.

4. Outcomes

The working group identified topics to be included in the training. The overarching topics include:

- a) Effective communication with nurses
- b) Appropriate Electronic Medical Record (EMR) use
- c) Timely incident reporting to OHSU
- d) Professional interactions with patients and staff

The group meets approximately once a month to provide updates on edits to outdated or inaccurate work instructions and templates published in the clinical research (CR) toolkits library. In addition, new tools have been developed to support education around identified topics. Finally, the group identified key terms and definitions that will be included in the module and added to the education program’s CR dictionary & acronym List.

5. Lessons Learned and Future Directions

Currently, the group is finalizing the structure of the training module. It will include an electronic, on-demand training module, followed by shadowing a clinic nurse. The module will be assigned to new CRCs around two months after they complete the Foundational Training sequence.

Category: Training, Career Development, and Staff Retention – Idea

The group also identified the need to standardize specific documentation within the EMR. Once approved by leadership, the group will create or update tools as well as create shared electronic templates available to CR staff in the EMR.

CRCs can benefit from and are interested in information and training on the research-clinic relationship. This can improve patient care, minimize negative outcomes, ease job frustration, provide confidence in their role, and expedite their onboarding process. Collaboration between research teams and clinic/infusion staff is an ongoing initiative that will benefit everyone involved.