

Onboarding

SUPPORTING A POSITIVE EXPERIENCE

Objectives

- Why is Onboarding Important?
- Resource Identification & Allocation
- Tips and tools
- Own the Experience

Why is Onboarding Important?

Who:



What: A systematic process of learning through multiple pathways and methods that provides vital information on what to do and how to do it for a particular role (in research)

Why is Onboarding Important?

When: First day of new role (but wait—it's really PRIOR to the first day!)—and continuing through time

Where: Onsite, Remote-Virtually



Why is Onboarding Important?

Why:

- Ensure that someone new to a role is informed of the tasks and responsibilities of their role;
- How to complete those tasks
- Ensure that identification & allocation of resources for the role are properly utilized.
- In addition, adherence to research-related rules and regulations must be followed.



How: In-person or virtual meetings, trainings, observations, self-directed reading/learning, online modules, connection to other research professionals and team

Chat Storm

What was the most anxiety-producing part of your first day?

Why is it so important?

- We all have had a first day—supportive preparation and implementation of onboarding allows for a smooth and planned start to a person in a new role
- Sets expectations—What is taught during onboarding and how it is delivered will set the tone and expectation of high-quality work for a new team member Everyone wants to succeed!
- Provides a structure and timeline for learning
- Provides a basis for future competency testing—and can be linked to those competencies for review and continued education
- Study quality and staff retention may be related to a positive onboarding experience

Size/Scale will affect Onboarding

1:1 (Smaller-scale) PI and role

2-5 (Mid-scale) PI, Research Team, and role

>5 (larger-scale) PI, Research Team, and role

Zoom Poll Question

Which Size/Scale of team would you consider yourself today?

- Smaller (1:1)
- Mid-Scale (2-5)
- Larger-Scale (>5)

Where does it start? *(Tips for Administrators)*

- Starts at the submission of a position with Human Resources (HR)
 - Job description should identify the responsibilities of the role
 - Providing HR a short description of the desired candidates to prescreen applicants including working hours, special requests, and specific requirements
 - Ensuring HR understands the turnaround timelines needed to ensure a hire by desired date
 - Interviewing candidates and providing clear timelines to decisions and communicating any changes
 - Welcoming a confirmed candidate after offer acceptance

See you at Day 1? *(Tips for Administrators)*

- Pre-onboarding with HR
 - reaching out to Human Resources and candidate ahead of first day
- Correspond and set up meeting the week prior with recruit for 1st day expectations
- Prepare for the functional basics
 - Request phone, pager, IT, network, electronic training accesses
 - Building accesses
 - Consider utilizing a checklist



See you at Day 1? *(Tips for Onboardees)*

- Pre-onboarding with HR & Hiring manager
 - reach out to both prior to your first day!
- Ask if you can have a short meeting the week prior to discuss any questions you have and expectations
- Ask if you need special accesses or privileges to complete first day activities



Onboarding methods (*Onboardees*)

- Dependent upon size of team
- Paper/Electronic Binders
- Checklists
 - Manager/Supervisor checklist for accesses, resources,
 - New team member: to ensure items of access and resources have been granted
- Orientation Schedule & Calendar
 - Provides a weekly schedule of learning objectives for new team member
 - Allows for positive dialogue between team and new team member
 - Provide rubric for future competency assurance
- Online learning
- Observation
- In-person meetings/trainings (with one or more persons on team—provides opportunity for meeting team members and learning different perspectives (may open up mentorship opportunities—refer to “Owning the Process”))

Access to Resources – Manager Requests

ID Access to: FGH, Moakley, BMC Hospital Floors, Pathology, BMC lab
Manager to email request to [DG-ID](#) office once employee has **BMC ID** Badge and employee number.

ID Access to: EBRC-4
Manager to email request to MEDID@bu.edu for **BU ID** access

Research Manager IT Requests

Manager to submit request for training to <https://bmc.service-now.com> with employee ID #

- ☐ BMC: R, H Drives
- ☐ EPIC & ARIA
- ☐ Telephone & Pager
- ☐ Visiting
- ☐ DocuSign (research group)

Email Distribution Group

Manager to submit request to add to DG-CHCRP email distribution group

BU Kerberos Password

Manager to request BU ID from Director (Needed: Phone#, FULL DOB, Personal email)

Shared Outlook Calendars

Manager to add new employee to **shared** CHCRP Patient Visit Calendar, Vacation Calendar, **Staff** WFH Calendar

Printer Share

Manager to email new employee the list of shared printers (PR1076, PR5611, PR5530)

EPIC Requests for training/access

New CRCs need this:

Main Epic template: BMC BEACON RESEARCH COORDINATOR TEMPLATE [T00083]
Subtemplate for remote monitoring: BMC RSCH AUDITOR SUBTEMPLATE [T00685]

First Day Meeting Discussions

Building Safety Orientation
Tips and Tricks
Onsite login
Preparation Tips for annual review updates
Time-keeping-Kronos and excel spreadsheet
Vacation Requests

Trainings, Classes, and Activities

Prior to the end of your 13-week probationary period, you should have access to all of the systems below, attended at least one of each meeting, and have completed the following trainings:

Training Activity	Resource	Date
Classroom Based Training		
New Employee Orientation	HR	
EPIC Training	Anthony S.	
Desk Based Training		
CTTL HSRP, BMC HIPAA, GCP/ICH	See Access Sheet	
Lab Safety Training	See Access Sheet	
Shipping Training	See Access Sheet	
SWOG CRA Training	See Access Sheet	
Meeting Attendance		
Protocol Feasibility Meeting	Annie or Anthony S.	
New Study Logistics Meeting	CRCs	
Disease-Specific Tumor Boards	Annie and Nurses	
Disease Group Research Meetings	Anthony S. and Nurses	
Weekly RN CRC Meeting	Anthony S.	
Grand Rounds	Zoom	
Bimonthly CRC Meetings	Annie	
Systems Access		
EPIC	Anthony S.	
ARIA	Anthony S.	
BU ID & email	Anthony S.	
INSPIR	See Access Sheet	
CTSU, CTEP ID	See Access Sheet	
Network Drive	Anthony S.	
SWOG	See Access Sheet	
Telephone and pager directory	Anthony S.	
R-Drive	Anthony S.	
Adobe Pro	Nick or Self	
Box	Annie or Anthony S.	
Shared CH-CRP Team & Vacation Outlook Calendar	Anthony S.	
Shadowing		
Clinical Research Coordinators	Whenever possible	
Clinical Research Nurses	Whenever possible	
New Patient Process (ongoing)	CRCs & CRNs	

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Orientation Schedule --

Orientation Activity	Resource	Date
Week 1	6/26/23	
Attend BMC Orientation	HR	
Welcome Meeting - CHCRF Tips & Tricks	Anthony	
Tour Lab(s)	Adrian CRCs	
Tour EBRC Building (Physical Surroundings Sheet)	Sarah	
Phone orientation	Orientation Binder	
Computer orientation	Orientation Binder	
Desk Based Training (See "Access to Resources" Page)	Orientation Binder	
Review "Resources" Section of Binder	Orientation Binder	
Understand Cancer Terminology	Annie Binder	
Review Intro to Cancer	Annie	
Review Intro to Clinical Trials	Annie	
Week 2	7/3/23	
Tour Moakley Clinics, Pharmacies, & IPS	Anthony S.	
Start required protocol & EDC trainings	Priva, Liz & Sarah	
Attend Thoracic Tumor Board	Faniela	
Attend Head and Neck Tumor Board	Olivia	
Review Intro to Amyloidosis	Anthony S.	
Review Home One Unique Assessments	Annie	
Intro to Protocol Navigation	Self / Annie	
Complete Navigating Protocols Exercises (in binder)	Self / Sarah	
Regulatory Introduction	Annie	
Review Shadow Charts	Samantha	
Week 3	7/10/23	
Attend GI Tumor Board	Carley	
Attend Colorectal Tumor Board	Olivia	
Witness research specimen acquisition, processing and shipping	CRCs (as needed)	
How to interpret lab flowcharts, manuals and instructions	Self	
Review Consent Form(s)	Self	
Review BMC Clinical Documents	Annie	
Successfully locate:		
Chart Review, Labs, Imaging, Treatment Plan, Encounters, Notes, Springboard Report, Performance Status and Vitals in EPIC	Epic Self	
Review Epic Research Tips and Tricks	Annie	
Week 4	7/17/23	
Attend Breast Tumor Board	Carley	

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Week 4	7/17/23	
Attend GU Tumor Board	Faniela	
Use a calendar of events to determine the timing and needs of an upcoming visit	Bruna, Carley or Faniela	
Review Data Management Principles & Overview	Annie	
Screening documents overview - Eligibility Checklist and associated documentation	Sarah	
Submit an eCRF	EDCs / Annie	
Process & ship specimens for a study	CRCs	
Assemble an abbreviated shadow chart (as applicable)	CRCs	
Take over first patient(s) and/or study(s)	CRCs	
Week 5	7/24/23	
Assist with SWOG audit prep	Team	
Attend Home SCT Tumor Board	Bruna	
The Informed Consent Process	Anthony S.	
Witness the Informed Consent Process	Nurses (as applicable)	
Understand Documentation of the Consent Process	Anthony S.	
AICC & CTC/AE Exercise	Sarah	
Discuss Audit & Monitoring	Priva	
Cancer & amyloidosis treatments overview	Anthony S.	
IRB Overview	Annie	
Intro to Screening Patients for Clinical Trials	Annie	
Review Eligibility Process	Annie	
Understand documentation of adverse events/toxicity	Nurses	
Attend Cutaneous Tumor Board	Olivia	
Week 6	7/31/23	
Assist with SWOG audit	Team	
Screening in Epic	Annie	
Review Enrollment	Annie	
Non-English Consent Process	Anthony S.	
Cardiology: Interpret an echo, ECG and US	Anthony S.	
Review patient management coordination	Anthony S.	
Understand purpose of notes to file	Sarah or Liz	
Review Regulatory Study Documents	Priva	
Week 7	8/7/23	
How to request slides: blocks from Pathology	Sarah	
Data wheel eligibility exercise	Self / Annie	
Pre-screen a patient for a clinical trial	Self / Annie / CRCs	
Complete an eligibility for a clinical trial patient	CRCs	
Register a patient (as applicable)	CRCs	
Interpret a pathology report & fill out a CRF	Self / Annie	

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Week 7	8/7/23	
Review drugs used in clinical trials at BMC	Anthony S.	
Drug Datasets and Drug Accountability Forms	Carley	
Personal Organization - sit with each CRC to shadow their method of personal organization (e.g. patient tracking, etc.). Start to develop own system.	CRCs	
Review RECIST Criteria	Annie	
How to request RECIST reads and de-identified imaging	Sarah	
Research Confidentiality and Privacy	Annie	
Investigational Pharmacy Overview	IPS (Mike or Hassan)	
Translational Research Core Overview	Kiana	
Week 8	8/14/23	
Conversational consent: conduct consent discussion with a patient (as needed)	Liz	
Understand New study procedures	Priva	
Non-treatment studies overview	Liz	
Research Billing Compliance and Velos	Nick	
Take over next patient(s) study(s)	TBD	
Week 9	8/21/23	
SAE Regulatory/IRB Requirements	Priva	
Identification and documenting SAEs	Anthony S.	
Processing, reporting and follow up for SAEs	Annie & Anthony S.	
Understand BMC process for documenting deviations & SAEs	Liz	
Research Billing Compliance and Velos	Nick	
Orientation Exit Meeting	Anthony & Annie	

By the end of week six, the above studies have been covered with you. At this point, you will start to take on studies of your own with the assistance of your preceptor.

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Onboarding items

- Functional Basics
 - Phone/pager/computer logins, accesses (emr, edc, network drives)
 - Building Accesses
- General Research Training
 - Certifications for GCP, HIPAA etc
 - Laboratory safety/utilization
 - IRB if applicable
 - Research Finance if applicable
 - Specific-departmental level research process SOPs and workflows
- Project-specific
 - Access to protocol/grant for specifics
 - Observation of processes where research must be integrated
 - Logistics and timing of project-specific duties



Small Group Breakout Discussion: (5 minutes)

1. Did you feel that the onboarding you most recently experienced was well-structured and aided in your orientation to your role?
 - If yes-what helped?
 - If no-what happened?
2. What tools were used in your onboarding experience?

Why is it so important?

- We all have had a first day—supportive preparation and implementation of onboarding allows for a smooth and planned start to a person in a new role
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Word Cloud

Thinking about your most recent onboarding experience, choose a word that best describes it.

<https://www.menti.com/bl2huygkrsnb>



Impact & Ownership

If you do not know where you are going, every road will get you nowhere

– Henry A. Kissinger

Gauging the Impact of Onboarding

Know the primary goal

- Training
- Competency
- Values and culture

Define measurable metrics

- Onboarding completion time
- Time to productivity
- Consistency and compliance
- Competency Based Assessments

An Early Picture of Success

- Completed essential training
- Demonstrate competence with required skills
- Understands what the deliverables are
- Aware of any gaps & how to fill them
- Knows when check in meetings will occur to evaluate progress

Is it Working?

Solicit Feedback:

- Surveys
- 360- evaluations
- One-to-one meetings

Revising the Process:

- Review suggestions and feedback
- Do the metrics show goals are being met?

Zoom Poll Question

Have you ever been asked to evaluate or provide feedback after onboarding?

- Yes
- No
- What's onboarding?



According to an article in the Journal of Medical Practice Management:

- 20% of staff turnover occurs in the first 45 days of employment
- 1 in 10 employees leave due to a poor onboarding experience

Reference:

Hills, L., D.A. (2022). Creating an exceptional onboarding experience for your new employees. The Journal of Medical Practice Management : MPM, 37(6), 278-283.

Owning the Process - Onboarding Yourself

Understand what already exists in the way of onboarding.

- Online portal, checklists, manuals and handbooks
- Ask a colleague who has been through the process
- Seek out support

Identify your gaps

- Get to know your job description
- Identify a strategy to fill the gaps
- Draft a timeline
- Do you feel competent in performing the tasks(s)?

What you need to know vs. Who you need to know

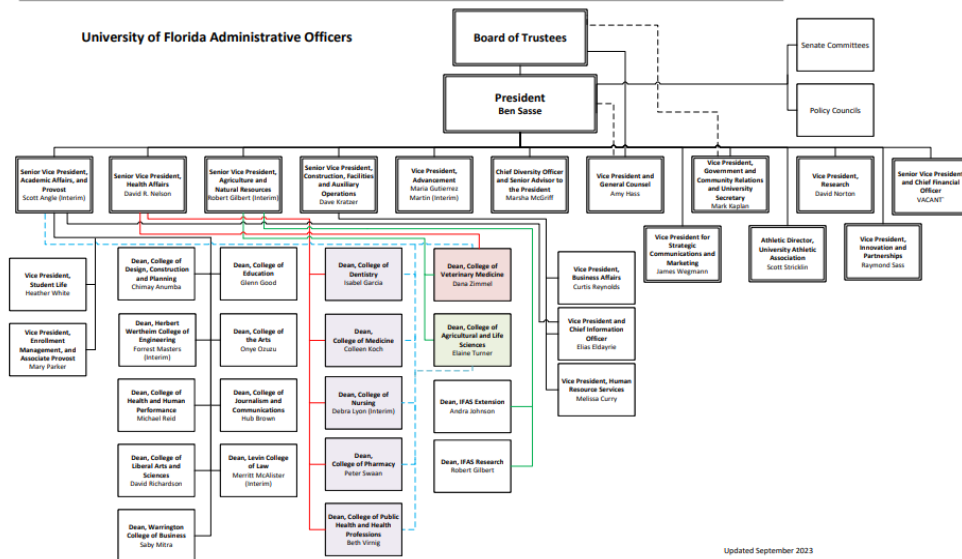
Finding support

- Identify your advocates and build these relationships

Identify Stakeholders (map):

- People closer to you on the map are likely to be more helpful with the day-to-day functioning of your role.
- Further out the more strategic your relationship with them is likely to be.

University of Florida Organization Chart



Owning the Process

Proactive and Positive

Clarify expectations – Ask questions

- Invest the time to learn what is expected
- Will you spend time shadowing others?
 - Hold off on making any changes immediately
 - Learn the why behind current processes

Chat Storm Question:

How long does it take to onboard a new employee?

How long does it take?

Onboarding is a comprehensive process involving management and other employees that can last up to 12 months. - <https://www.shrm.org>

..."most effective organizations onboard new hires for the duration of their first year..." <https://hbr.org/2018/12/to-retain-new-hires-spend-more-time-onboarding-them>

Existing Team & New Relationships

- Recognize that it may take some time for you to be fully acclimated into the work team.
- Spend time listening and observing
- Avoid making assumptions or judgments based on your previous experiences
- Attempt to embrace the team culture and find your fit within it.

Environment for Growth

- New environment, new people, new projects, and new processes.
- Exciting and *Stressful* – focus on the positive
- Reframe minor disappointments and small discrepancies in expectations.

