Guidance for Onboarding New Research Personnel

Claire E. Oppenheim, MPH

Director of Operations, BMC Immigrant Health Center

Clinical Operations Project Manager, Department of Psychiatry

Solomon Carter Fuller Mental Health Center

85 East Newton Street, 8th floor, #805A, Boston, MA 02118

617-414-4797 | Claire.Oppenheim@bmc.org

BOSTON MEDICAL CENTER

EXCEPTIONAL CARE. WITHOUT EXCEPTION.

First, questions for the group

What are you hoping to learn today?

What was your onboarding experience like?

Will any of you need to onboard a new team member soon?

Objectives

1. To gain comprehensive understanding of research-specific onboarding steps for new research personnel at both BU and BMC.

2. To present differences and similarities between onboarding and orientation.

3. Suggestions for department-specific resources that could be developed, or may already exist.

Outline

1. "HR" Onboarding vs. "Departmental" Onboarding

2. BU vs. BMC

3. Orientation

4. Onboarding

5. Tools and Resources available to you

HR vs. Departmental Onboarding

HR Onboarding → New Employee Orientation (HR) → Departmental Orientation → Departmental Onboarding

Start Date!
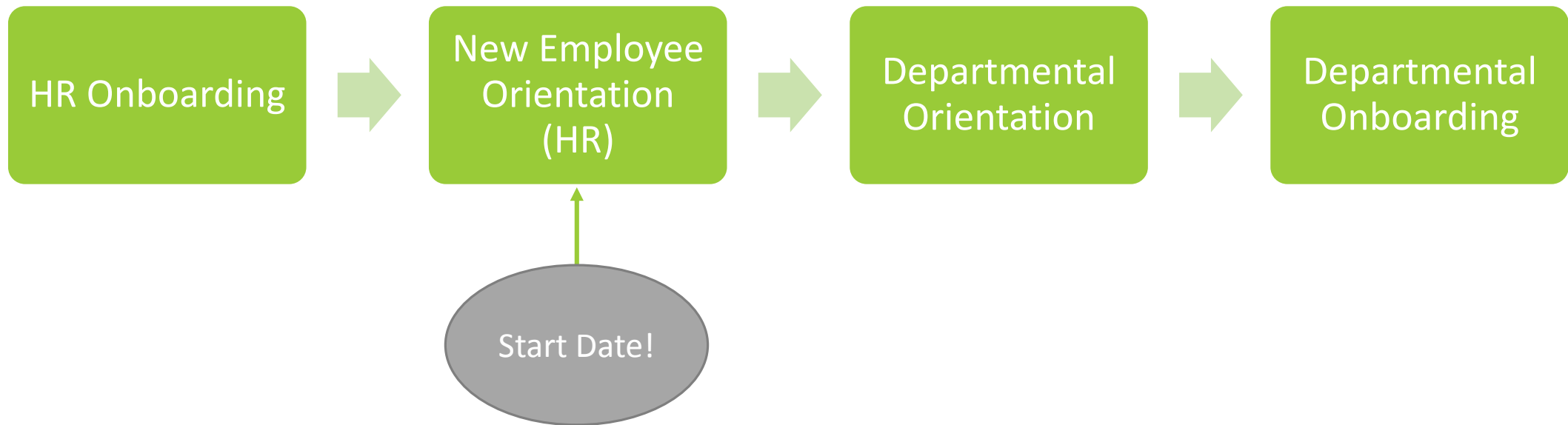
VS.

Boston University	Boston Medical Center
BU Sponsored Programs	BMC Research Operations
Terrier Marketplace	POs, Check Reqs, Lawson, etc.
Gift Cards	ClinCard
BUMC IT	BMC IT / ITS Service Desk
BU Occupational Health	BMC Working Well Clinic
BUworks/SAP	Workday, Kronos, Other
DuoMobile	Imprivata ID
BU Gmail	Outlook
OneDrive	BMC Box
	IPS
	EPIC
ROHP & IBC	
INSPIR II	
REDCap	
CTSI	

Orientation vs. Onboarding

ORIENTATION
Getting to know your department/studies
Getting to know your institution

ONBOARDING
Access to systems, portals, resources you'll need
Ensuring compliance with research regulations

Orientation

- Overview of your Department – Clinical, Research, Education
- Virtual Tour of "need to know" electronic resources and locations
- Physical Tour of BMC, BUSM, your specific research lab
- Review of key Institutional policies, where to find them
- Review of Departmental Policies, where to find them
- Who Do I Ask?
- Top 10 Research Resources
- Financial Management for Research
- Professionalism
- Personal & Participant Safety
- IRB 101

	Orientation Plan	
Time Est.	**Topic**	**Format**
Recommended for ALL new research hires (faculty, staff and students)		
1 hour	**Departmental Overview** • "Who's who"; departmental org chart • High-level overview of clinical, educational and research programs in department • Introduce PIs, their research areas and research teams • Navigating BU vs BMC (hiring, purchasing, remuneration) • Map of BUMC	Supervisor to review **Departmental Overview PowerPoint presentation** with new hire.
2 hours	**Virtual Tour of BU/BMC Systems** • Overview of the various BU and BMC portals, particularly those that are relevant to research; where to find good online resources • E.g. Workday, Kronos, BMC Box, ITS Service Desk, ClinCard, VelosCT, G:Drive/H:Drive, BUMC IRB, INSPIR II, BU CRRO, REDCap, IBC/RIMS, etc…	New hire to watch **Virtual Tour training video** (2 hr). Follow-up with supervisor if have questions.
30 min	**Research On-Boarding Checklist, Appendix A** • Review the Research On-Boarding Checklist in Appendix A. with your supervisor to determine which steps are required for your specific role • Refer to Appendix B. for more info about how to complete each of these on-boarding steps	Supervisor to review **On-Boarding Checklist (Appendix A in this document)** with new hire to determine which steps do/do not apply. Supervisor to then manage new hire's completion of relevant onboarding steps.
Read on own	**Review Departmental and Institutional Policies** • *Departmental protocols*: (1) Research and Office Space, (2) Clinical Coverage for Research Visits, (3) Remote Access to Research Data, (4) Dress Code, (5) Purchasing Research Supplies, (6) Work from Home, (7) Grants Policy & Procedures, (8) Student Hiring Policy • *Institutional policies*: Hours of Work, Paid Time Off, Holidays, Dress Code, Drug & Alcohol, Social Media	New hire to read set of **eight (8)** *departmental* **protocol documents** and **six (6)** key *institutional* **protocol documents** on own. Ask supervisor if they have questions. **NOTE**: All BMC institutional policies can be found on the BMC Intranet. All BU institutional policies can be found in the BU Employee Handbook.
Read on own	**Who Do I Ask?** • Who do I ask for which types of questions? A review of key contact persons for research, both within Dept. of Psychiatry and at institution level (BU & BMC)	New hire to review **Who Do I Ask?** handout. Follow-up with supervisor if have questions.
Read on own	**Top 10 Research Resources** • The "Top 10" research resources that investigators and their research teams should be aware of when seeking guidance or information about the conduct of research at BU/BMC	New hire to review **Top 10 Research Resources** handout on own. Follow-up with supervisor if have questions.
30 min – 1 hours	**Tour of Psychiatry Research Center (DOB1150) and DOB9 Psychiatry Offices**	**Supervisor to provide tour** of Psychiatry Research Center, DOB9, and/or any other BUMC locations that are relevant to new hire's role.

Orientation

Recommended for new research <u>faculty</u>, research <u>project/program managers</u> and new <u>financial/grants management</u> personnel		
30 min	**Financial Management for Research** • Understanding your % effort • Grants Protocol & Procedure • Overhead at BU vs. BMC • Fringe/Benefits at BU vs. BMC • Grants fee	Supervisor to assist new hire in setting up meeting with Grants & Contracts team for **in-person training**.
30 min	**Basics of Hiring Research Staff** • Introduction to the various research career levels and corresponding salary ranges • BU vs. BMC hiring • Very brief overview of hiring process	Supervisor to assist new hire in setting up meeting with Assoc. Dir. of Grants & Contracts for **in-person training**.
Read reference guide	**Basics of Student Internships** • Types of student interns to tap into • Process of hiring student interns • Requirement to receive financial compensation or academic credit	New hire to review **Student Internship Reference Guide**. Follow-up with supervisor if have questions.
Recommended for all new research <u>staff</u> (all levels) and <u>student interns</u>		
Read on own	**Professionalism** Expectations of Professionalism in Dept of Psychiatry	New hire to review **Professionalism PowerPoint**. Follow-up with supervisor if have questions.
1 hour	**Personal and Participant Safety** • Protecting yours and participant's confidentiality • Room orientation during study visits • Clinical coverage protocol • What to do in a clinical/medical emergency • How to work with difficult participants • Suicidal ideation • Serious Adverse Events (SAEs) • Psychosocial bleed	Supervisor to review **Personal & Participant Safety PowerPoint** with new hire in-person and address questions as needed.
1 hour	**IRB 101** • Basic introduction to BUMC IRB policies, processes, and key principles.	New hire to review **IRB 101 PowerPoint** (created for a BU CRRO Research Professionals Network workshop). Follow-up with supervisor if have questions.
Recommended specifically for Northeastern <u>Co-op</u> students		
	Psychiatry Research Center Front Desk • How to run the front desk • Phones & forwarding • Fax • Etc...	New co-op hire to review **How To Run the Psychiatry Research Center Front Desk handout** on own and follow-up with supervisor if have questions.
	Managing Your Stipend Payment • Entering hours in Kronos • Factoring in taxes • Rate of vacation time accrual	**Supervisor to discuss with new hire in-person.**

Department of Psychiatry Onboarding Checklist

Onboarding – Access to Portals/Systems

- G:Drive, and specific folders

- REDCap

- VelosCT

- Confirm INSPIR II access, My Studies tab

- Remote/VPN access

- EPIC/eMerge

- ClinCard

- BUworks/SAP sections (e.g. Purchasing/Procurement)

- BU DuoMobile and/or Imprivata ID (BMC)

- Set up Outlook Archives, share Outlook Calendars

- Get added to Departmental listservs

Onboarding – Complianc

- CITI certification (w/BUMC as institutional affiliation)

- Get added to IRBs

- BU ROHP clearance *even if you're a BMC employee

- Get added to PI's lab RIMS profile

- Complete BioRAFT trainings

- Regulatory documentation
  - Resume/CV in regulatory binder
  - CITI certification in regulatory binder
  - Delegation of Duties Log
  - Study Training Log
  - FDA 1572
  - Financial Disclosure Forms (FDF)
  - IPS

Department of Psychiatry Onboarding Checklist

Appendix A. On-Boarding Checklist

HR On-Boarding Checklist
For new BU and BMC employees, the following on-boarding tasks are managed by the BU or BMC Human Resources (HR) On-Boarding Teams and should be completed *prior* to new hire's start date.

Done?	WHAT	WHEN
	Background check	All new hires
	Reference check	All new hires
	CORI	All new hires
	Employment/Education Verification	All new hires
	BMC Occupational Health clearance	All new BMC hires
	BU Occupational Health clearance	All new BU hires
	Activate BMC email/username	All new BMC hires
	Activate new BU email/username	All new BU hires
	Get a BU Sponsored Guest Account or BU Non-Compensated position	All new BMC hires who will need BU access (BioRAFT, REDCap, etc…)
	Have supervisor submit IT Request for New BMC IT Customer	All new BU hires who will need BMC access (G:Drive, EPIC, ITS Service Desk, etc…)
	Get BMC or BU ID badge	
	Set up direct deposit	via Workday for BMC hires via BUworks/SAP for BU hires
	New Employee Orientation (BU or BMC)	All new BU/BMC employees

Departmental On-Boarding Checklist
It is the responsibility of the new hire's direct supervisor to ensure that the following on-boarding tasks (as applicable to the new hire's role/responsibilities) are completed during their first 1-2 weeks.

NOTE: Many of the hyperlinks included below are to *internal* BMC webpages. You must be logged into a BMC computer or connected to BMC VPN in order to access these sites.

Done?	WHAT	WHEN
	Complete CITI Program certifications with "Boston University Medical Campus" as institutional affiliation.	If study staff on any BUMC IRB protocols
	Get BU Research Occupational Health Program (ROHP) clearance	If study staff on study that requires/required submission/approval from BU Institutional Biosafety Committee (IBC)
	Get BMC Occupational Health clearance	If study staff's hiring process did not include BMC occupational health clearance, but they will be interacting with BMC patients and/or working in BMC clinical space.
	Confirm access to INSPIR II portal. If no access, submit request for access here. Once have access, update your personal profile	If study staff on any BUMC IRB protocols
	Work with your supervisor/PI to add you as study staff on all applicable IRB protocols	If study staff on any BUMC IRB protocols

Onboarding – Compliance

	Supervisor to request access to G:Drive via ITS Service Desk request; have your supervisor give you a virtual tour of relevant G:Drive folders	If need access to G:Drive folders
	Confirm that you have access to Kronos. Have your supervisor give brief tutorial in using Kronos to submit timesheets.	If paid BMC employee
	Confirm that you have access to BUworks/SAP Employee Self Service (ESS) tab. Have supervisor give brief tutorial in using ESS to submit timesheets.	If paid BU employee
	New hire to request Token/Remote (VPN) access for BMC (via ITS Service Desk request)	If need remote access to BMC systems to fulfil job responsibilities. REMINDER: Review "Remote Access to Research Data" policy
	Install/set up BU DuoMobile	If will need access to BU systems (REDCap, SAP, etc...)
	Supervisor to added to PI's RIMS profile	If study staff on BU IBC protocol (any study that requires IBC approval)
	Complete BioRAFT lab safety trainings	If study staff on BU IBC protocol
	Sign up for classroom-based IATA training (sign-up via BioRAFT)	If will be shipping any biological specimens for research
	Get cleared to work in DOB1150 BSL-2 laboratory 　1. Get ROHP clearance 　2. Read DOB 1150 BSL-2 lab manual 　3. Complete BioRAFT trainings 　4. Attend in-person training with lab manager	If will be working with any biospecimens in DOB 1150 BSL-2 lab
	Sign-up for eMerge/EPIC training (View Only or Edit-level, as appropriate)	If will need access to BMC electronic medical records
	Submit request to access to REDCap. Once you have access, REDCap Log In page: https://redcap.bumc.bu.edu/	If study utilizes REDCap (online HIPAA-compliant database, with survey functionality as well)
	Watch VelosCT training videos, submit request to access VelosCT	If study requires use of VelosCT (clinical trial management system/portal used by BMC Clinical Trials Office (CTO) for management of financial, administrative and clinical research information and activities)
	Get access to BUworks/SAP, Purchasing tab (Terrier Marketplace)	If will be responsible for purchasing study supplies for BU study via Terrier Marketplace
	Set up your BMC Outlook email archives (just call BMC IT @ 617-414-4500 to set this up)	If using BMC Outlook as primary work email
	Share your Outlook calendar with your team	If using BMC Outlook as primary work calendar

Onboarding Resources

RESEARCH PROFESSIONALS NETWORK
BMC/BU MEDICAL CAMPUS

Supporting Clinical Research Excellence

BU CRRO > Research Professionals Network > Resources & Programs

http://www.bumc.bu.edu/crro/research-professional-network/resources-programs/

Resources & Programs

RESEARCH REFERENCE GUIDE

ONBOARDING CHECKLIST

ZOHO CONNECT GROUP

RPN WORKSHOPS

PAST RPN WORKSHOPS

RPN AWARDS

RESEARCH CERTIFICATIONS

STUDY MANAGEMENT TOOLS

LEADERSHIP COMMITTEE

MEMBERSHIP ROSTER

urces-programs/reference-guide/