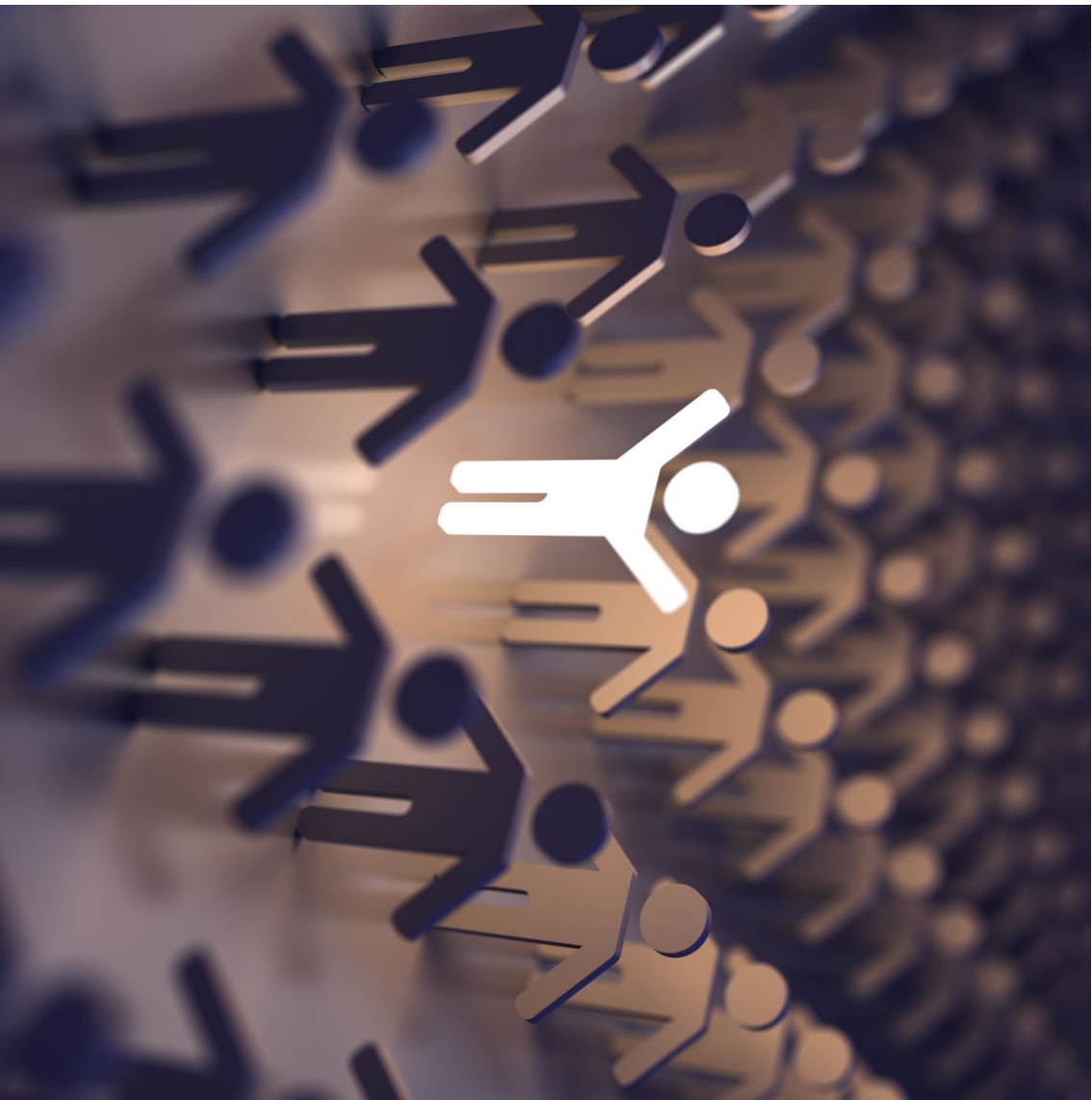# New Staff Orientation & CRC Onboarding

Neurodevelopment & Psychosis Section

(*previously Neuropsychiatry Section*)
University of Pennsylvania
School of Medicine
Department of Psychiatry

Sage Rush, M.S.Ed. (Sr. Clinical Research Manager)

sagerush@pennmedicine.upenn.edu
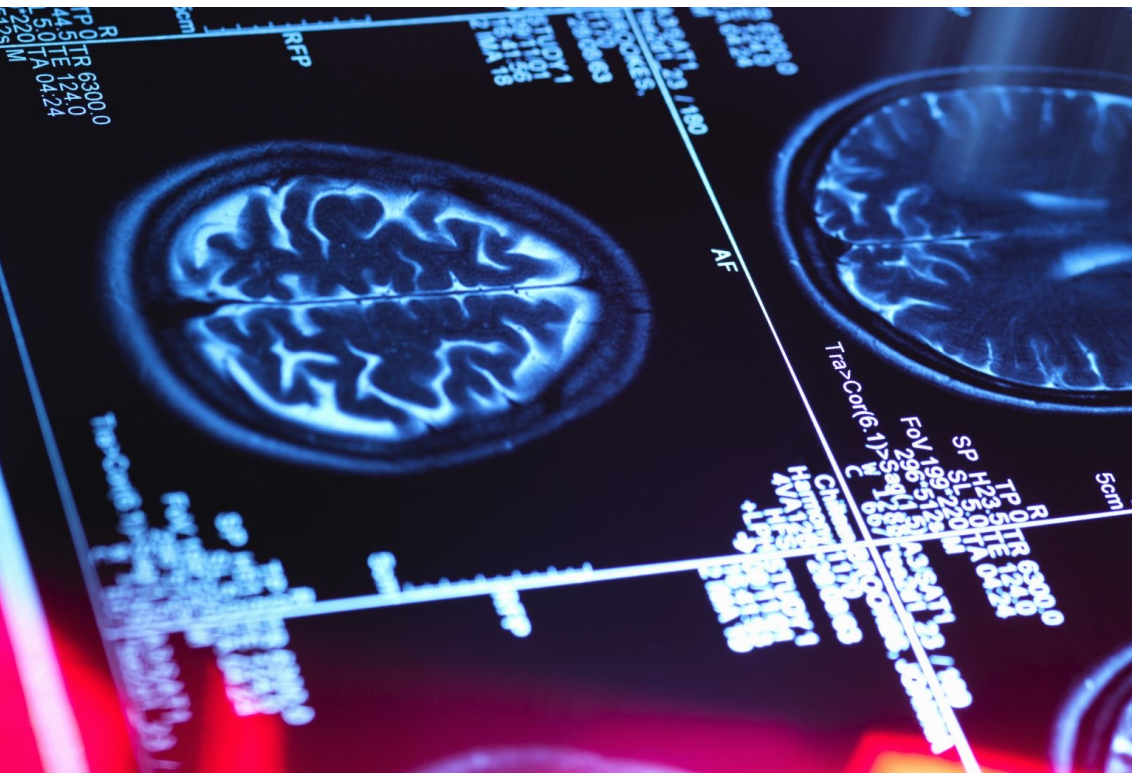
Most reachable via Slack

Welcome!

- Introductions
  - Name, pronouns (if you'd like to share)
  - Role/project
 - What are you most excited about in your new role?

Who are we?

- University of Pennsylvania
  - School of Medicine
    - Department of Psychiatry (Chair: Dr. Maria Oquendo)
      - **Neurodevelopment & Psychosis Section (Director: Dr. Raquel Gur)**
        - Brain Behavior Laboratory (Dr. Ruben Gur)
        - Penn Lifespan Informatics and Neuroimaging Center (PennLINC; Dr. Ted Satterthwaite)
        - Lab for Motivation in Psychiatry (LaMP; Dr. Daniel Wolf)
        - Roalf Lab (Dr. David Roalf)

Faculty & Staff

- Within our Section, we have ~16 faculty, each of whom have a team of staff (coordinators, analysts, students) that make their research possible

- You can read more about our faculty here: https://www.med.upenn.edu/bbl/faculty.html

- And our staff here: https://www.med.upenn.edu/bbl/staff.html
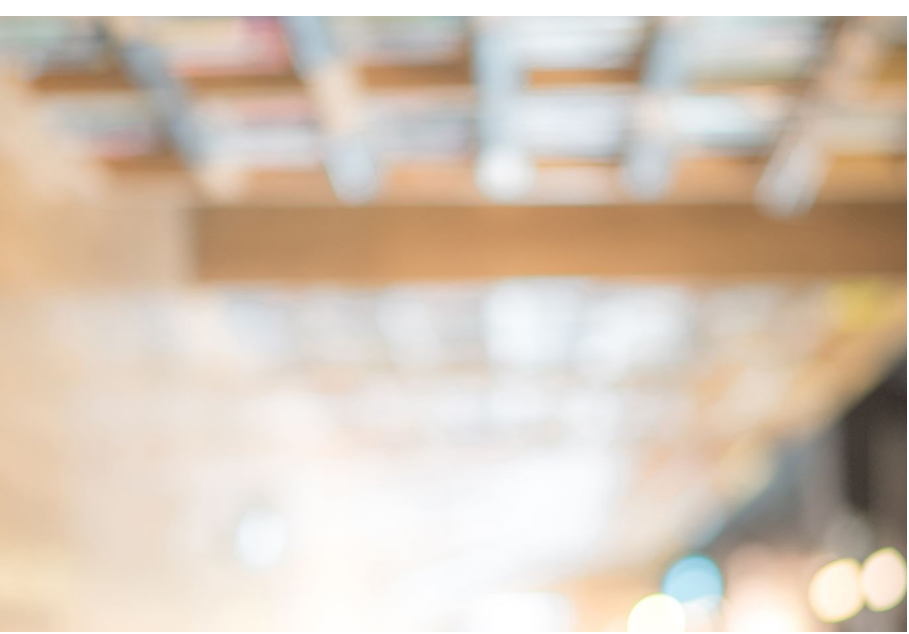
Themes of our research

Clinical: Symptoms, Functioning, Treatment

Genetics

Neurobehavioral: Cognition, Emotion, Olfaction

Neurodevelopment

Neuroimaging: Structural, Functional

Cellular-Molecular

Electrophysiology
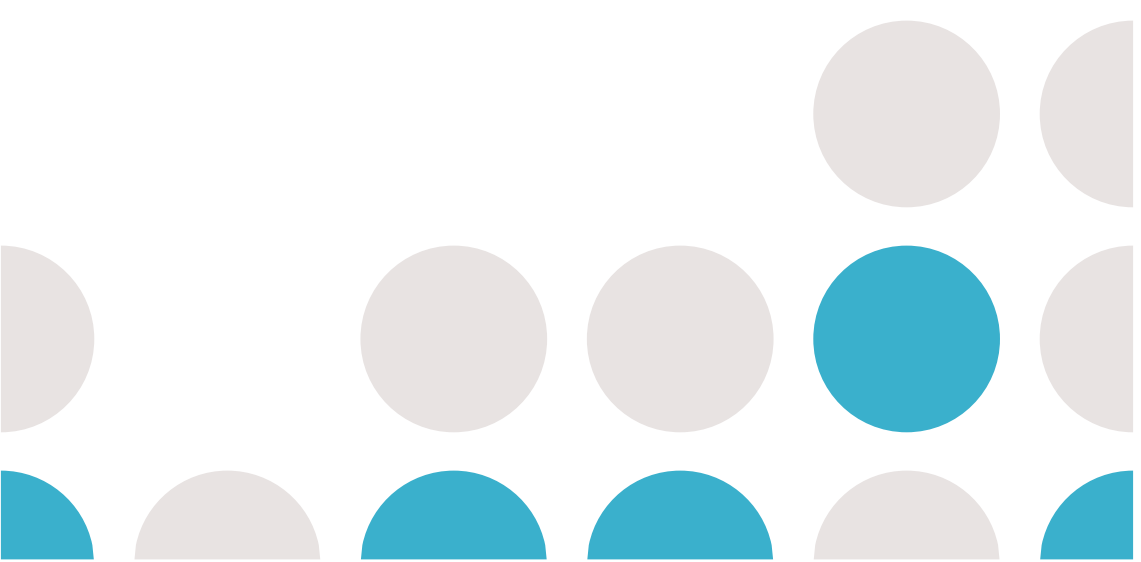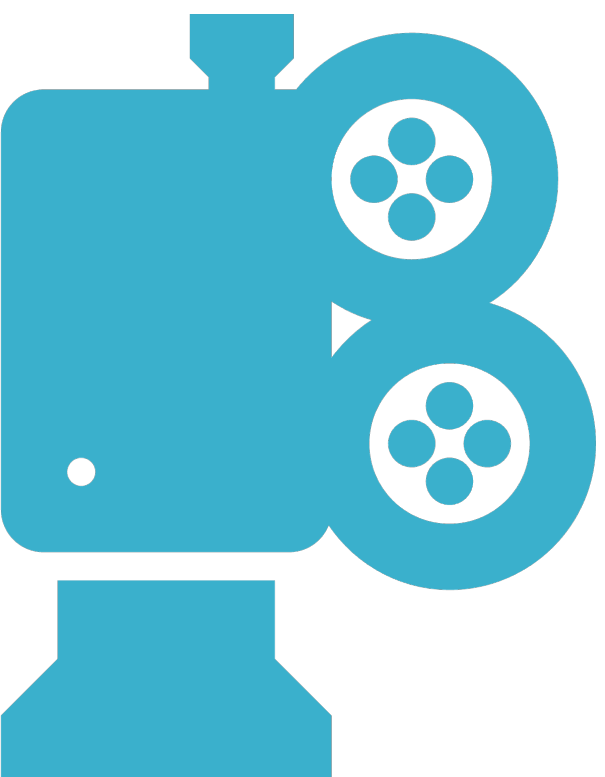
Ecological Momentary Assessment

A great place to start…

- Watch video recording linked here from HeadsUp educational workshop, *"An Early Psychosis Training Workshop for Community Mental Health Providers"*

Introductory Period

- For all NEW staff members, the Introductory Period consists of the first four months in your position.

- Used to determine if performance meets the expectations of the position and if continued employment is warranted.

- Within first few weeks, staff member and supervisor meet to review goals, expectations, and responsibilities. Meet again half-way through and at end of this period.

  - *Completed in WorkDay. After meeting to discuss goals, the supervisor/manager initiates process, staff member to review/sign, then back to manager to finalize.

- https://www.hr.upenn.edu/policies-and-procedures/policy-manual/performance-and-discipline/introductory-period

WorkDay

- Need PennKey to access
- Submit time off (vacation, sick), payslips, benefits, among other helpful resources
- Link: https://www.workday.upenn.edu

PTO & Sick Time

- Upon hire, you will receive 5 PTO (vacation) days. After your introductory period you will accrue 1.25 PTO days and 1 sick day per month.

- PTO/sick time rolls over into next year, but maximum is 24 days (or 192 hours). Once you reach this number, you will not accrue more time.

- In addition to PTO and sick time, other types of "time off" policies exist including bereavement, jury duty, domestic or sexual violence leave, FMLA, parental leave, disability, etc. You can read about these policies here.

Revised PTO Accrual Rates and Maximum PTO Days*

| Service Time	New PTO Accrual Rate	PTO Days Accrued/fiscal year (not to exceed 24 days)
At hire date	5 days	n/a
Less than 1 year	1.25 days per month	20 days (5+15)
At least 2 years	1.83 days per month	22 days
At least 3 years	2 days per month	24 days

- **The University observes the following holidays:**

  - New Year's Day
  - MLK Day
  - Memorial Day
  - Juneteenth
  - Independence Day
  - Labor Day
  - Thanksgiving Day & Friday following Thanksgiving
  - Christmas Day
  - Special Winter Vacation – weekdays between Christmas Day and New Year's Day are designated as special winter vacation days.
  - *When a holiday falls on a Saturday, the preceding Friday is observed as the holiday. When it falls on a Sunday, the holiday is observed the following Monday.
  - **You can google "UPenn Holidays Fiscal Year (current year)" to see the actual dates for the above holidays
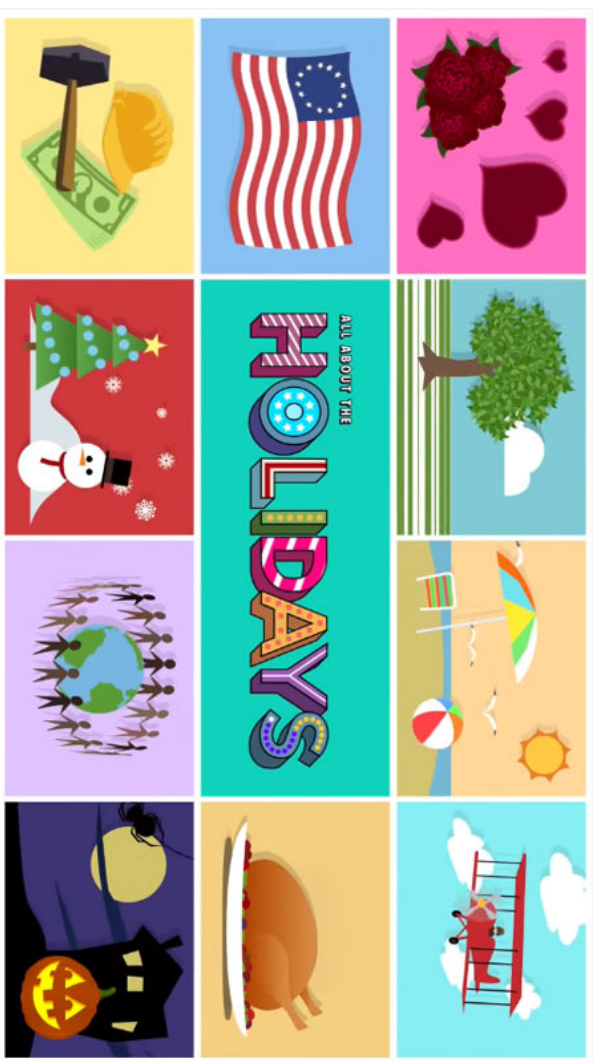
Penn Benefits & Other Info

- Penn benefit info found here (no internal systems needed to access)
  - https://www.hr.upenn.edu/PennHR/benefits-pay
- Other Penn discounts/deals (no internal systems needed to access)
  - https://www.hr.upenn.edu/penn-community/deals-discounts
- What you need to know & what's nice to know
  - https://www.hr.upenn.edu/PennHR/learn-grow/orientation-and-onboarding

**For CHOP staff, Nina is our CHOP expert** (LaneyN@email.chop.edu or reach out on Slack)
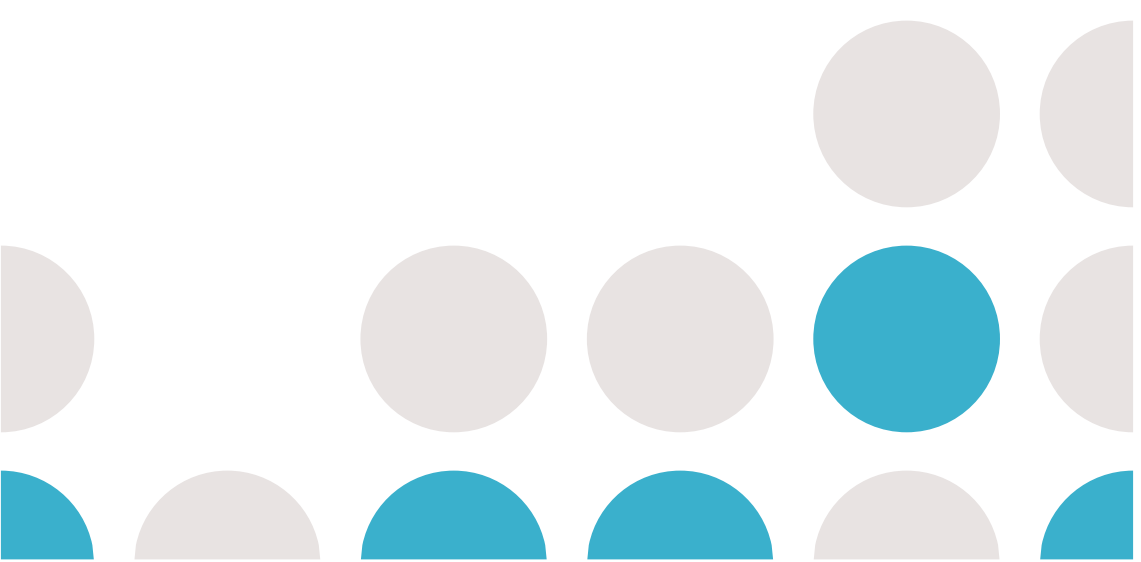
Office of Clinical Research (OCR)

- Excellent resource for all things clinical research

- Society for Clinical Research Coordination and Management (SCRCM)

- Penn databases – PennChart, CTMS

- Clinical Research Manual
  - Start up guides; study close out procedures

- Link: https://www.pennmedicine.org/research-at-penn/office-of-clinical-research

Penn IRB

- The Institutional Review Boards (IRB) are federally regulated entities with the mandated to review biomedical and social behavioral research studies that take place within or under the authority of Penn.

- IRB Office Hours are a great resource. You can sign up here: https://zcal.co/pennirb

- IRB home page link: https://irb.upenn.edu

- **Nina Laney is our IRB expert.
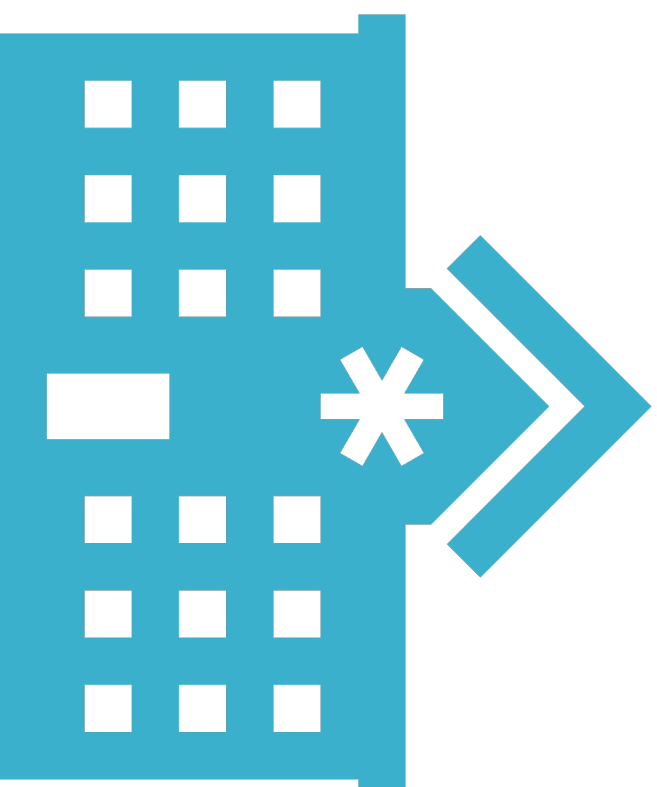
BIT CRC Onboarding Overview

- GitHub/wiki pages
- Clinical Core SOPs
- Mandated Reporting Training
- Oracle
- REDCap
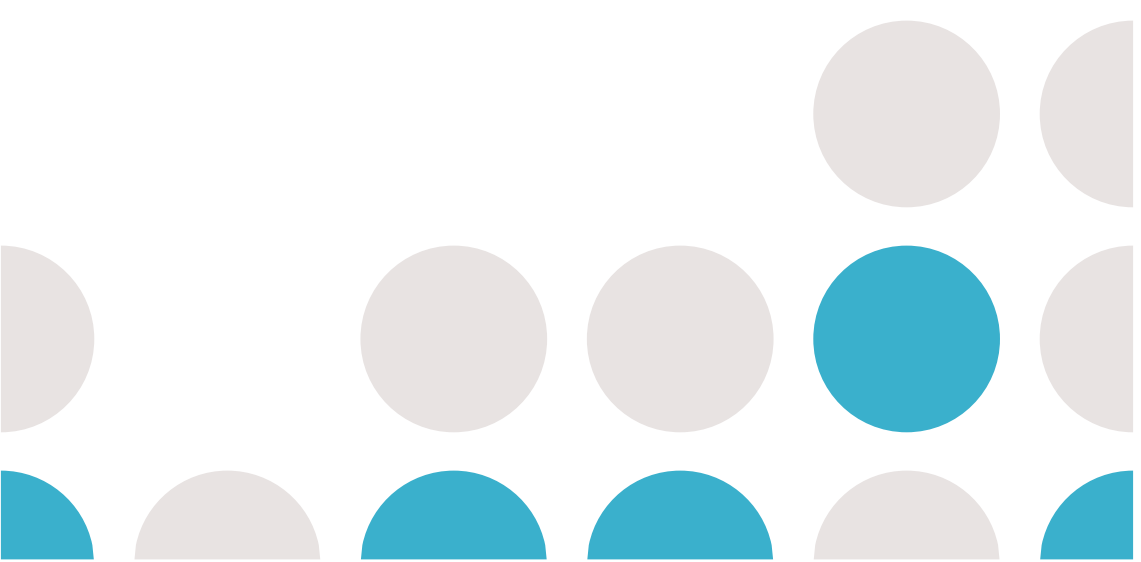- DaySmart Appointments (previously known as AppointmentPlus)
- Slack Best Practices
- Other/miscellaneous
- ClinCard
- Consent

GitHub/Wiki

- Need pennkey to access
- Central place with information on our section, procedures, staff, etc
- If you haven't yet, spend some time browsing/reviewing various sections here:
  - https://wiki.pmacs.upenn.edu/neuropsych/Main_Page
  - Clinical assessors MUST review following sections:
    - Clinical Assessment Core
    - Bioinformatics IT Core (BIT)
- **As of Summer 2022, Wiki is migrating to GitHub
  - https://github.com/upenn/BIT/wiki
  - See Slack channel #section-updates for instructions on how to access it (instructions are pinned to the channel)

Clinical Core SOPs

- Need Saturn/VPN access to review
- Under new directory structure on Saturn, all clinical core SOPs can be found here:
  - /new_directory_structure/clinical_assessment/sops
  - **All coordinators** MUST review:
    - /covid_resurgence_sop_[date]
    - /covid_virtual_research_reference_guide_[date]
    - /documentation_sop_03_06_2020 (*PART 1 ONLY*)
    - /Coordinators/Lab-wide Recruitment 2018+/Procedures/SOPs/RecruitmentAssessorsSOP_2019.07.09
  - **Assessors (GOA/CAPA/SIPS/SCID/self-report assessors)** MUST ALSO review
    - /clinical_incident_reporting_sop_03_08_2021
    - /documentation_sop_03_06_2020 (*PART 1 AND PART 2*)
    - /feedback_scheduling_sop_05_03_2021
    - /global_functioning_role_social_covid_mods_sop_05_12_2021 (*if you are administering global functioning role/social interview*)
    - /self_report_scales_sop_02_26_2021

Mandated Reporter Training

- No internal systems needed to access

- Anyone who is working with minor participants (i.e., pts 17yo and younger) must complete the mandatory reporting on child abuse training (it is state law). You can complete that training at the link below (you will have to register first). The training will review the definitions of child abuse or neglect and details the procedures on filing a report. It is a free online course and takes around ~3 hours to complete.

- https://www.reportabusepa.pitt.edu

- If not completed yet, we will set a soft deadline
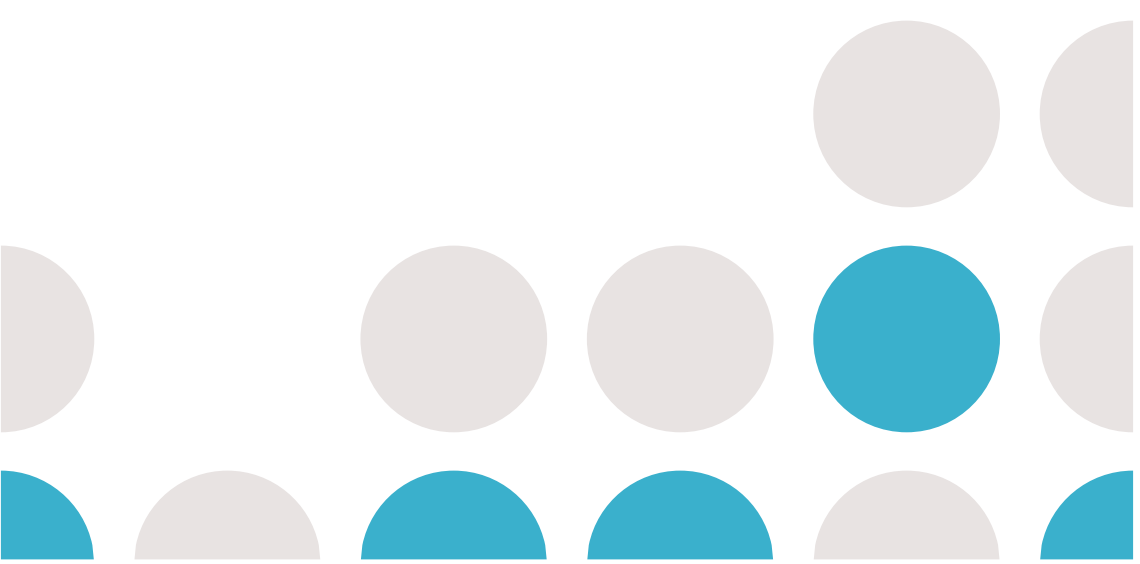
Oracle

- Unsurprisingly you need Oracle access to access Oracle
  - You will receive access after today's orientation/overview of it.
- You can read about Oracle on our Wiki here:
  - https://wiki.pmacs.upenn.edu/neuropsych/Oracle
- Walk through (*you should also read about these sections on the wiki as well)
  - STUDY_ENROLL
  - VISIT/DEMOS ENTRY
  - MEDICATION
  - CONSENT MANAGE
  - DIAGNOSIS
  - There are many other "tables"/links you will use in Oracle – your lead CRC is responsible for training you on this (e.g., recruitment, MRI).

REDCap

- Unsurprisingly you need REDCap access to access REDCap

- There are 2 main REDCap servers:

  - **Axis** (which is what we use for internal projects or multi-site projects where we are data coordinating center): https://axis.med.upenn.edu

  - **Penn Medicine/PMACS** (which is what some protocols use at request of PI or other misc reasons): https://redcap.med.upenn.edu

- REDCap self-report training walk through if you will be administering self-reports (steps also found in self-report SOP)

- REDCap interview training will come during assessment training

- REDCap training videos: https://axis.med.upenn.edu/index.php?action=training

  - **Be sure to watch: Brief Overview, Detailed Overview, Data Entry Overview**

- Must complete *REDCap: Best Practices for Maintaining HIPAA Compliance and Protecting Personal Health Information (PHI)*

  - You can find the training in WorkDay under "Learning" → "Browse Learning Content" → type in above name of training or you can go directly to it here at this link.

  - Retrieve certificate by going to "Print Your Learning Certificates (Worker)" type in name of training, and click PDF in upper right-hand corner then send this on your onboarding channel
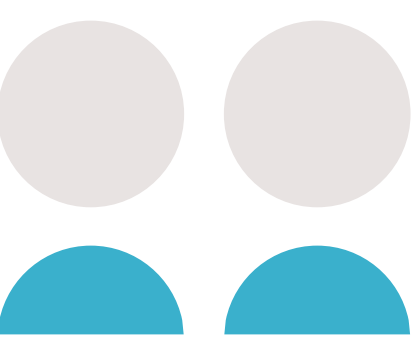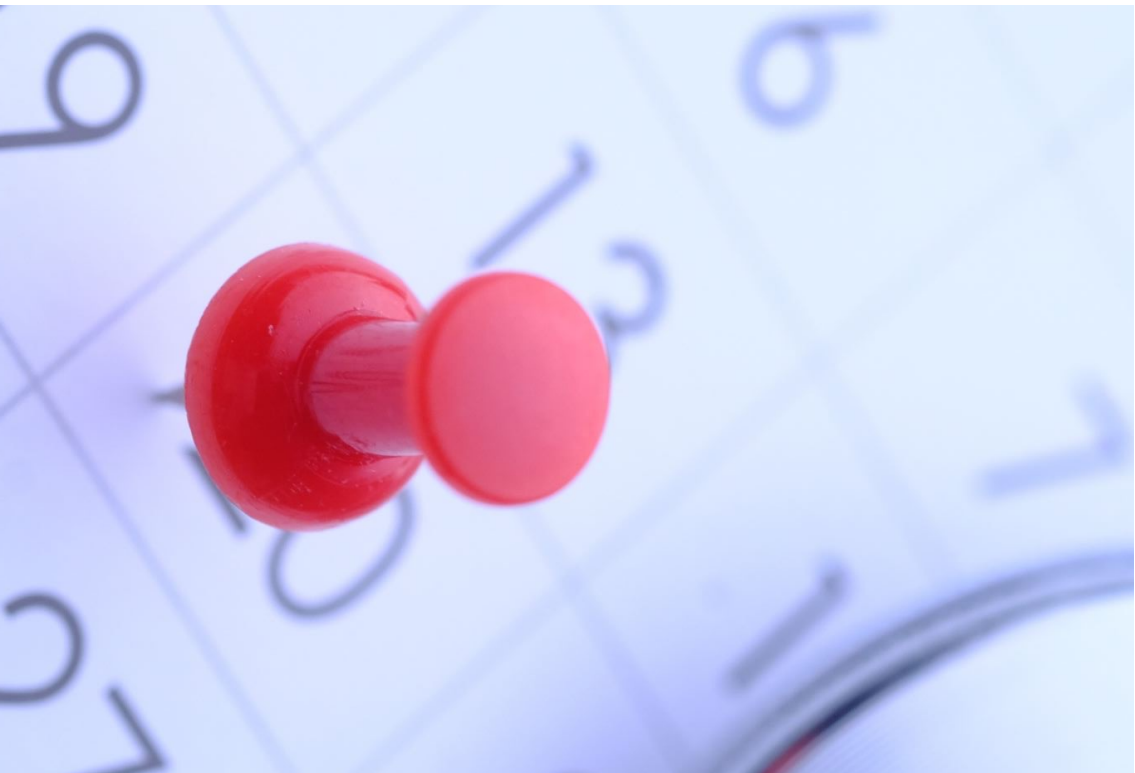
DaySmart Appointments

- Previously known as AppointmentPlus/AP
- Online scheduling system that all protocols use
- Used to add participant visits and your reserved time where you cannot run a visit
- Walk through demonstration
 - https://www.daysmartappointments.com

Slack Best Practices

- Unsurprisingly you need Slack to access Slack
- Slack >> email
- Can edit your profile with a picture/title/pronouns/etc
- Use channels rather than DM for questions – *if you have a question, chances are other staff have the same question as you!*
  - DMs ok when needed (e.g., specific question for specific person that only relates to you); common group of ppl where channel not made/needed (and can star these channels for easy access)
- Reply in threads
- @ people when asking questions
- Feel free to use statuses to help colleagues know when you're offline v online
- There are general slack channels you will be added to and there are "fun" slack channels as well. Most of the channel names are explanatory for what issues/updates to post about, but if you are ever unsure, do not hesitate to reach out to clarify
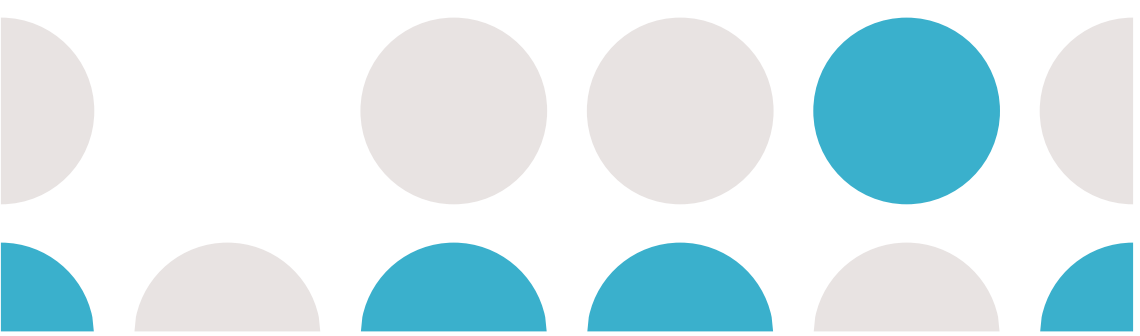
Other/misc

- Faculty & Staff Handbook
- Teams page for our section -- *PSOM Neurodevelopment & Psychosis Section Coordinators*
  - Where meeting notes are kept among other important information/resources
  - Staff Quick Facts page – fill out info if you haven't yet
- Meeting review
  - *BIT Office Hours* Tuesdays @ 3pm
  - *Coords* Wednesdays @ 11am
  - *Case* Thursdays @ 11am
    - Case Conference Documents Review (need Saturn/vpn)
- Assessment Training (if applicable) – touch base
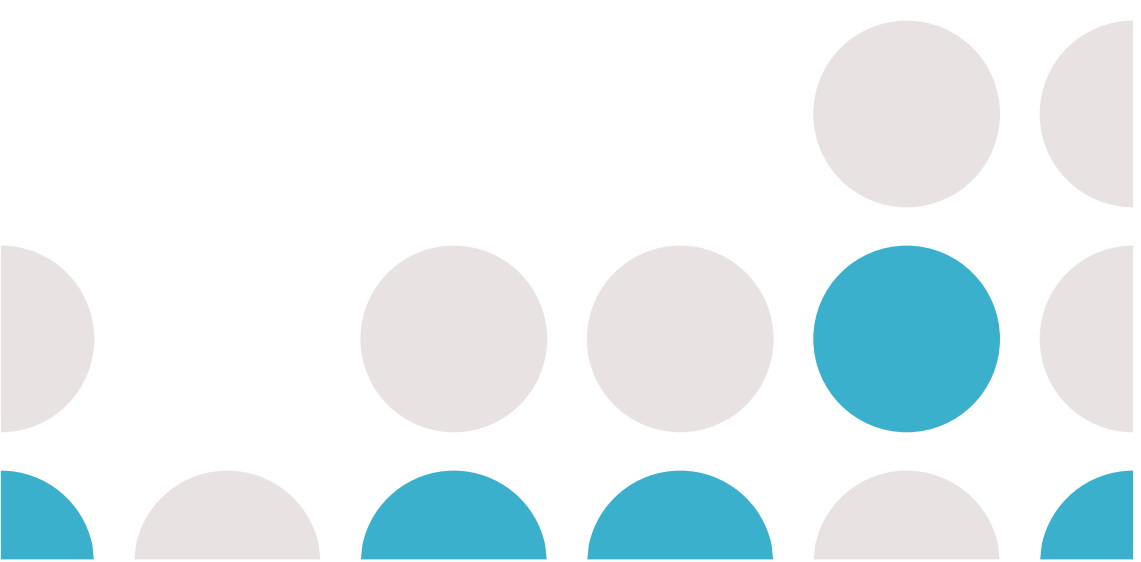
Other/misc continued

- Any errors on documents MUST be initialed & dated (NO whiteout)

- Know your IRB/grant protocol – you are the expert on all the ins and outs/day-to-day needs of the protocol you are working on. Know all inclusion/exclusion criteria.

- Supply closet on 10 Gates (binders, pens, notebooks). If you cannot find what you're looking for, reach out to the Clinical Research Manager who can coordinate a bulk order for all coordinators.

- Study checklists & quality assurance procedures
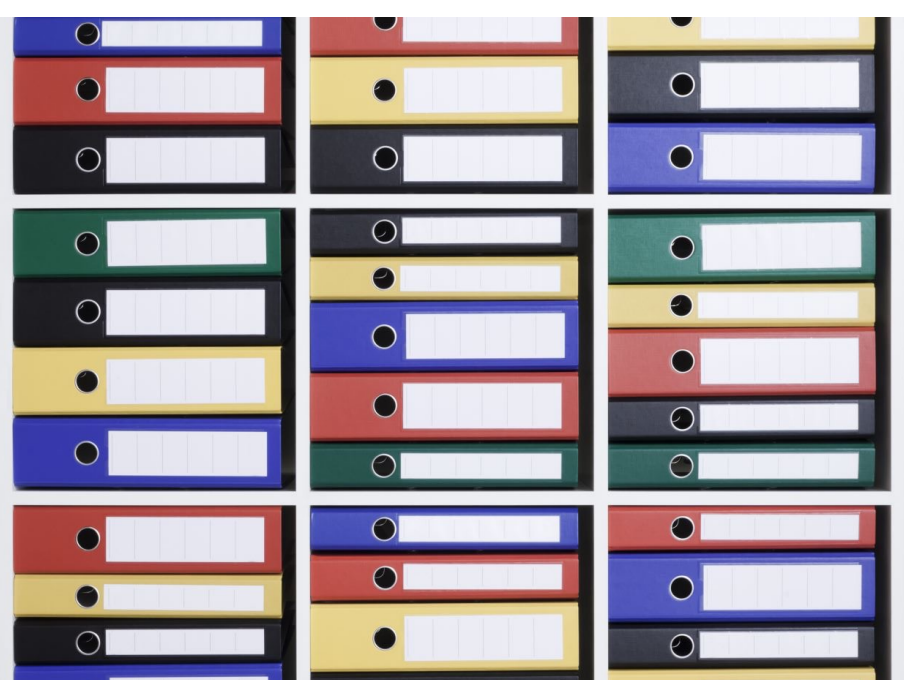
ClinCard (payment system)

🕐 Schedule time to review payment procedures (~45 minute training)

🪐 PowerPoint found here:

/P_Cash/ClinCards Folder/ClinCard Best Practices for CRCs/ClinCard_Penn_CHOP.pptx

File path will move with Saturn restructuring

Consent Best Practices

- Schedule time to review consent procedures (best practices, electronic consents, ~15 minute training)
- PowerPoint found here:
  - /new_directory_structure/clinical_assessment/training/general/consent_review_10_26_2021

Next Steps

☐ Complete WorkDay steps with your supervisor for your introductory review period.

   ☐ Supervisor initiates this process in WorkDay.

☐ Review Faculty & Staff Handbook that includes many of the embedded links in this ppt (benefits, resources, onboarding).

☐ Watch HeadsUp training video if you are working with a CHR/psychosis population (slide 6).

☐ Review GitHub/Wiki pages related to IT needs/onboarding (slide 15).

☐ Review Section SOPs (slide 16).

☐ If you are working with minors (pts 17 and younger), complete mandated reporter training (slide 17).

   ☐ Send certificate on your onboarding channel.

☐ Complete REDCap HIPAA training (slide 19).

   ☐ Send certificate on your onboarding channel.

☐ Lead CRC to review in-depth Oracle/REDCap training with you.

Questions?
Comments?
Concerns?