

Instructions and recommendations for implementing the Universal Onboarding by role:

Student/Clinical Faculty (new & returning)	Academic Program (Clinical Coordinator/Clinical Instructor/Compliance)	Facility/Agency Coordinator
<p>Instructions & Considerations</p> <ul style="list-style-type: none"> • Review preclinical training instructions provided by the academic program Clinical Coordinator/Clinical Instructor. • Complete the CCEP Core Orientation requirements as instructed by the deadline provided by the academic program. <ul style="list-style-type: none"> • CCEP core orientation module, test, and evaluation (annually) • Student/Faculty Passport • TB Attestation (annually) • Complete Agency-specific requirements (orientation, compliance training, forms, etc.) • Upon completion of CCEP & Agency requirements, download/save verification documents and either provide to your clinical coordinator or upload to the document management system used by your academic program (i.e. Rotation Manager, Castlebranch) • Reminder: Failure to complete the requirements by the deadline may delay your clinical start or the inability to participate in clinical. • NOTE: All requirements above are to be completed before starting clinical and annually. 	<p>Instructions & Considerations</p> <ul style="list-style-type: none"> • Review CCEP & agency onboarding requirements (annually) <ul style="list-style-type: none"> • CCEP Core updated yearly in June • Update and revise processes to ensure ongoing clinical faculty & student compliance • Remove all old educational materials from repositories, and school LMS systems (i.e. Canvas) as needed • Provide direction, guidelines, and instructions for preclinical training and orientation requirements to all clinical students & faculty annually and include the following: <ul style="list-style-type: none"> • CCEP Core Orientation (annually) • Student/Faculty Passport Checklist • TB Attestation (annually) • Agency-specific requirements • Verify completion of all items listed above for clinical students & faculty (annually) • Validate returning student & faculty compliance with all onboarding requirements required annually. • When requested, provide agency coordinator with documents using the agreed-upon mechanism for sharing documents. • NOTE: Failure to provide documents to the clinical agency within specified time frames breaches the affiliation agreement and may result in additional audits, agency probation, and/or loss of clinical privileges. • Solicit feedback from students & clinical faculty. • Participate in Triangle CCEP meetings. 	<p>Instructions & Considerations</p> <ul style="list-style-type: none"> • Review and update agency requirements. <ul style="list-style-type: none"> • Review agency-specific information to remove any redundancies with the core orientation information. • Provide guidelines, instructions, and due dates to academic programs for onboarding requirements. • Coordinate with the academic program agreed upon due dates for clinical requests, clinical confirmations, and student information for clinical groups/preceptor experiences. • Solicit feedback from key stakeholders within the organization. • Participate in Triangle CCEP meetings that will contribute to the revision of materials and student onboarding processes.