

Training for Florence

According to GCP, everyone involved in research should be “*qualified by education, training and experience to perform their respective task(s)*”. In line with this it is necessary to ensure all end users receive appropriate training in the use of Florence prior to being granted access to the live instance, and that evidence of this is captured appropriately.

Florence is also able to hold training records centrally, such that everyone can evidence they were qualified by education, training, and experience for their roles.

This document outlines how evidence of training in the Florence system for end users should be managed by champions and superusers, and how other evidence of qualifications should be maintained centrally.

Throughout this document, references to Champions include Deputy Champions.

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Florence training

The training required for study delivery teams prior to being granted access to Florence differs from the training required for Champions and JRMO users.

General users

People seeking access to Florence for general purposes in order to manage study documentation must complete training relevant to their role (please see Role specific training below). Once completed, preferably using their NHS Mary email address users must email a copy of their training certificate to their Champion. The Champion will add the user to the live environment and add the correct access permissions. Florence will usually email the user to invite them once the Champion has added the user.

Once the user has been invited to the live environment, they are responsible for uploading their Florence training certificate, their CV (which should be signed via annotation in Florence), their most recent GCP certificate, Florence Attestation, and handwriting example. These documents must be uploaded to the appropriate folder in the Training and Education binder.

There is no limit on the types of training records that can be held in the Training and Education binder; the documents listed above are mandatory, but it is recommended that users also upload copies of other key documents demonstrating essential training and qualifications (e.g. informed consent training, IATA training, etc). There may be divisional guidance on what records should be uploaded to Florence.

Role specific training

Where individuals will fulfil several roles (e.g. where a lone PI is responsible for all aspects of a study and will be performing study coordination activities too), training for all relevant roles must be completed before being granted access to Florence.

Coordinating, Principal, and other Investigators

Please complete this training in [English](#), [Español](#), or [中国人](#) if you will be responsible for signing documents and demonstrating oversight. This training takes less than 15 mins.

Users responsible for uploading and managing documents

[Please complete this training](#) if you will be responsible for uploading documents and logs, requesting signatures, adding due dates to documents (e.g. for GCP certificates), completing logs, or setting up logs. This training takes 1-2 hours.

Monitors

[This training](#) should be completed by anyone who wishes to monitor eISFs which have been set up in Florence, or study team's training records. This training takes less than 1 hour.

Champions

If you will be a Champion for your division, please speak with the JRMO.

You will need to complete the [elSF training for Implementation Team](#) within [Flo University](#), successfully complete a proficiency assessment within the UAT environment, and sign the Champions delegation log in the live environment before you can be granted Champion permissions.

Leavers

When staff leave their post (not when they stop working on a study), Champions are responsible for moving their training records from the “Current staff” folder to the “Previous staff” folder.

Expiring training

It is possible to assign effective and expiry dates to documents in Florence. It is recommended that these are added to training which must be completed on a regular basis (e.g. GCP certificates), as this allows users to run a report to see which records have an upcoming expiration date.

Updated documents (e.g. new GCP refresher certificate) should be uploaded as a new version of older documents, rather than being uploaded alongside them.

Requesting access to Florence live instance

Users should request access to the Florence [live environment](#) from their Champions. They will need to provide evidence of training in the system commensurate with their role as described above.

Requesting access to Florence testing environment

If needed, users should request access to the Florence [testing environment](#) from their Champions (and Champions should request access from the JRMO superusers). The Florence testing environment is signified by the icon below in the top left corner of the web browser.

