



PASSERELLE's guide to onboarding in Patient-Oriented Research



PASSERELLE

National hub in
capacity development for
patient-oriented research

Pôle national de développement
des capacités en recherche
axée sur le patient

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Introduction

Welcome to PASSERELLE's Onboarding Guide for Patient-Oriented Research!

Who is PASSERELLE?

Welcome to PASSERELLE's Onboarding Guide for Patient-Oriented Research (POR). This guide is designed to help new team members, people with lived experience, and researchers navigate the onboarding process, ensuring that all individuals feel informed, supported, and engaged from the start.

At PASSERELLE, we believe that collaboration, inclusiveness, and the integration of diverse expertise and patient lived experiences are essential in research. This guide reflects our commitment to creating an environment where everyone, regardless of their background, feels empowered to contribute meaningfully to research projects.

What is Patient-Oriented Research (POR)?

[Patient-Oriented Research \(POR\)](#)¹ is a collaborative approach to research that actively involves patients, caregivers, and other knowledge users as equal partners in the research process. The goal is to generate knowledge that is relevant, accessible, and actionable, ultimately leading to better health outcomes and an improved healthcare system.



Why this Onboarding Guide?

This guide was created to address the need for a structured approach to collaboration in health research. Beyond just administrative steps, effective onboarding is about building relationships, fostering trust, and ensuring that diverse expertise and lived experiences are meaningfully integrated into research.

By providing a clearer path for collaboration, this onboarding guide supports improvements in health research practices by ensuring that diverse voices are heard, valued, and integrated. This not only enhances team cohesion but also equips us to tackle complex challenges, develop more inclusive solutions, and ultimately improve health outcomes for all.

How long does onboarding take?

The length of the onboarding process varies based on factors such as:

- The complexity of the role
- Team dynamics
- Organizational culture
- The level of prior experience

For some, onboarding may take just a few days, while for others, it may span several months. A well-paced onboarding process allows new individuals to build confidence, deepen their understanding, and fully integrate into the team at a comfortable pace.

¹Canadian Institutes of Health Research. (2019). Strategy for Patient-Oriented Research. <https://www.cihr-irsc.gc.ca/e/41204.html>

What to expect

What to expect from this guide?

This guide provides a structured and comprehensive approach to onboarding, ensuring that new individuals, no matter their role, feel supported, informed, and engaged from day one.

Onboarding is structured around three key phases:

- **Preparation:** Identifying essential elements for a successful onboarding experience.
- **Pre-Onboarding:** Setting the stage for an easy transition by establishing expectations, sharing necessary resources, and ensuring the right infrastructures are in place.
- **Onboarding:** Facilitating integration through clear role definition, targeted training, meaningful relationship-building, access to essential tools and taking action from debriefing.

Ongoing support: Support doesn't end once onboarding is complete, it is an ongoing process embedded throughout every phase of onboarding. From preparation to active onboarding and beyond, continuous follow-ups, professional development opportunities, and long-term guidance help ensure that individuals remain engaged, supported, and set up for success within their team and the broader research environment.

Key areas of onboarding

The guide also focuses on three critical onboarding areas:



Cultural integration: Establishing relationships, understanding team values, and fostering a sense of belonging.

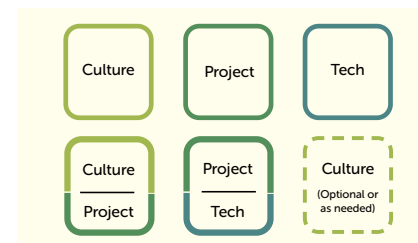


Technological setup: Gaining access to necessary platforms, tools, and digital resources.



Project-based readiness: Clarifying roles, tasks, and expectations to ensure effective contribution.

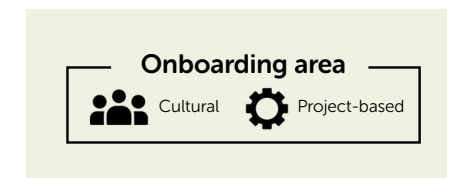
To help navigate the resources in this guide:



Color-coded shapes

and patterns help identify the onboarding area and whether a step is required or optional.

Icons in resources will indicate whether it is Cultural, Technological, or Project-Based related.

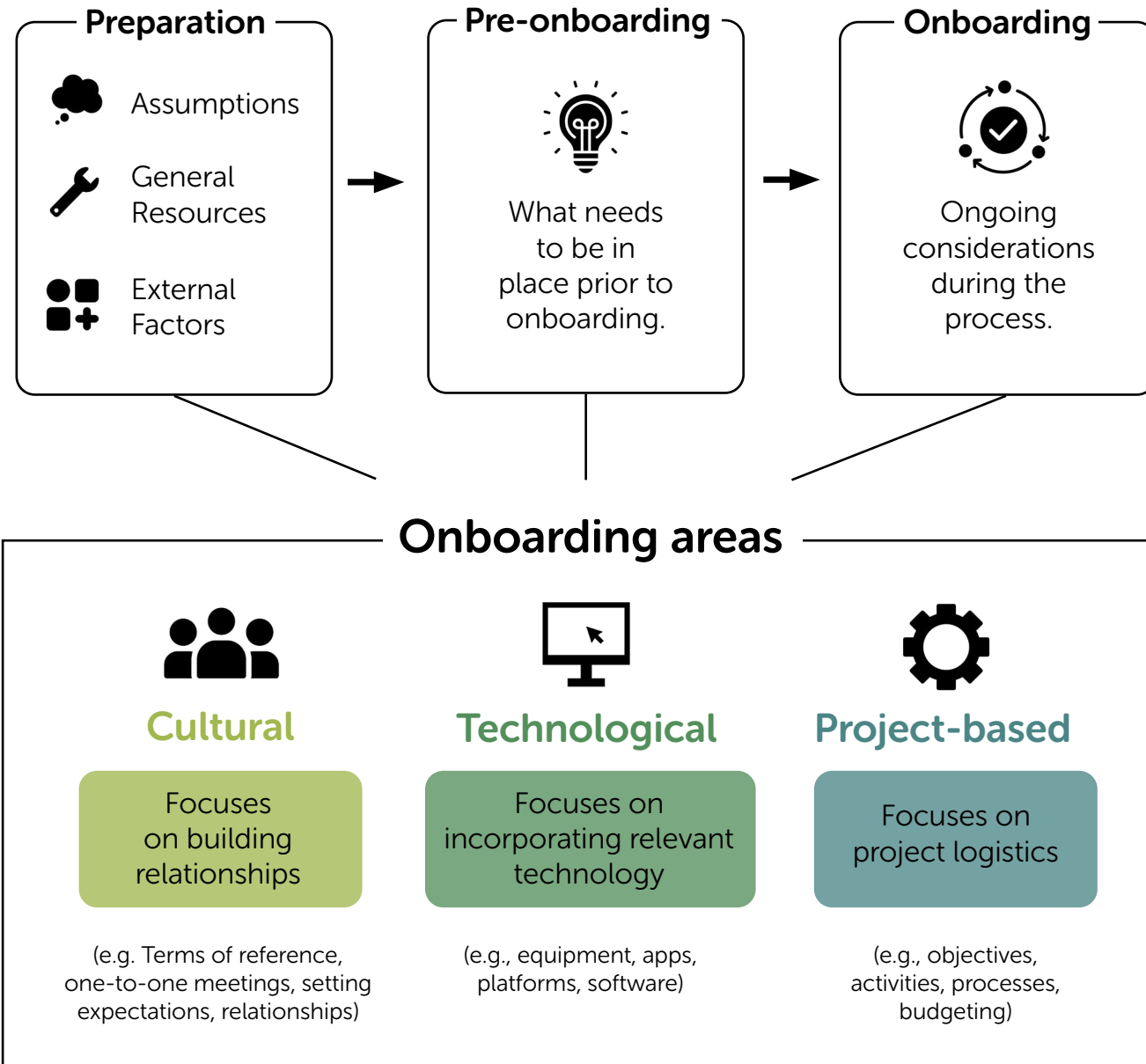


How to use this guide

Click the video below.



Framework



Preparation

Foster a safe and inclusive environment



Consider values and principles that guide your collaboration



Educate yourself on inclusion practices



Examine your assumptions



Explore your readiness

Set logistical infrastructure



Project management software, document-sharing platforms, and necessary equipment are in place



Appropriate and accessible technology for partnerships and projects

Meet community needs



Prepare to adapt research methods or priorities



Dedicate time for experienced staff to create materials and lead onboarding



Provide accommodations that individuals require as participants may face personal, social, and systemic factors



Consider organizational or laws/regulations that could affect the project

Financial and time considerations



Budget and funding

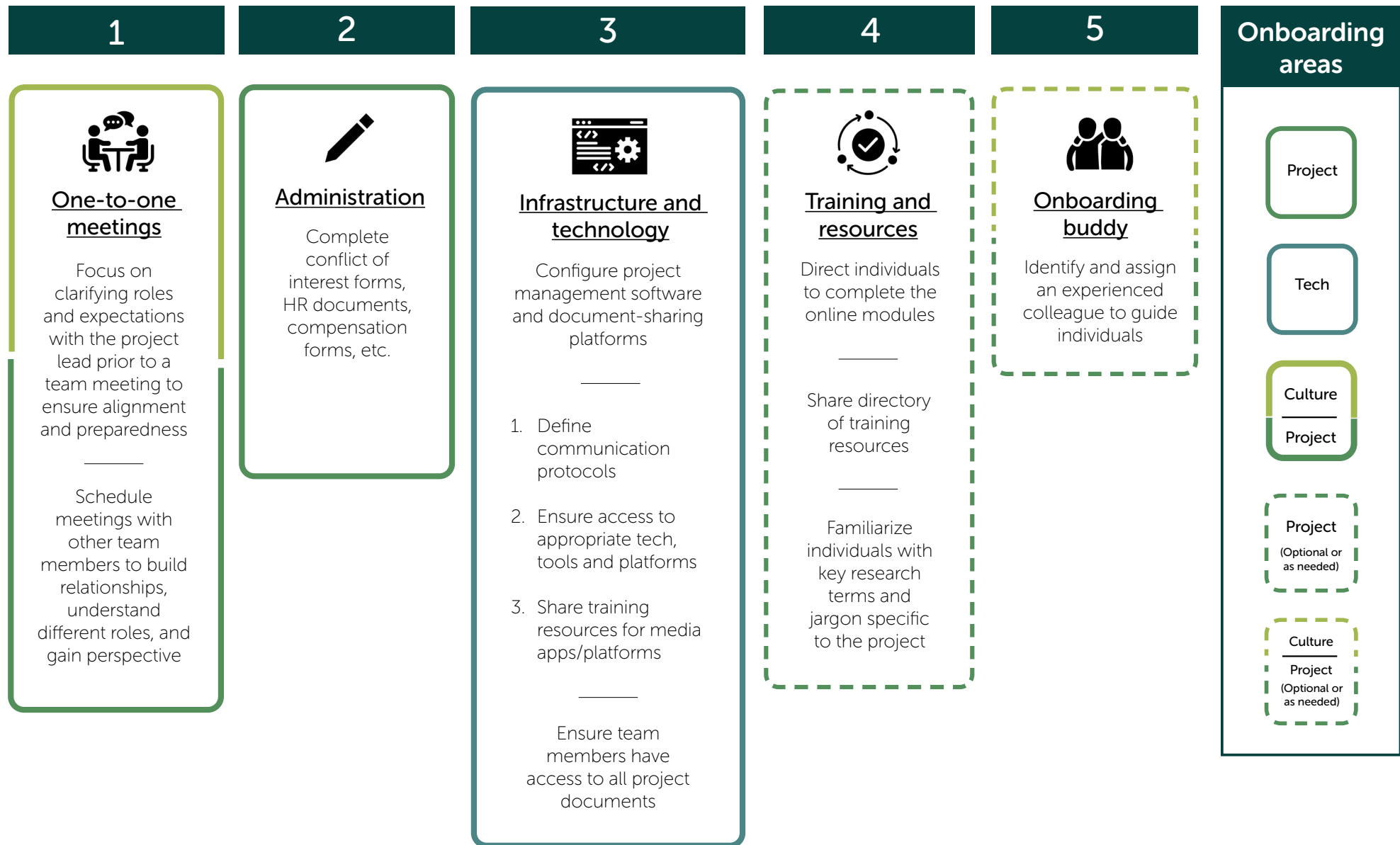


Plan for flexibility and responsiveness



Pre-onboarding process

Progression of pre-onboarding



Pre-onboarding considerations

One-to-one meetings

Quick tip: Use the first one-to-one meeting to listen deeply—this sets the tone for trust, clarity, and shared understanding moving forward

Understand the project



Learn about the project's goals, values, and research culture.

Build the relationship



Have a conversation with the team to discuss mutual needs, expectations, and readiness.

Clarify your role



Discuss your responsibilities, time commitment, and contributions to the project.

Review logistics



Confirm practical details like compensation, workload, and support.

Resources

[Invitation to partner \(example\)](#)

[Collaborative agreement](#)

[Risk Assessment](#)

[Relationship evaluation](#)

[Benefits Checklist](#)

[Financial considerations](#)

[Gut check questions](#)

[SPOR compensation guideline](#)

[Feasibility checklist](#)

[Timeframe checklist](#)

[Back to Pre-onboarding process](#)

Pre-onboarding considerations

Administration

Quick tip: Break information into small steps and check in often—onboarding should feel like a conversation, not a checklist.

Support completion of forms and paperwork



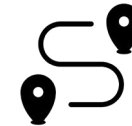
Walk through required paperwork together and offer help as needed.

Introduce key policies and expectations



Share workplace and research policies in clear, friendly language.

Offer a clear path for what's next



Let them know what to expect and who to contact for help.

Resources

[Benefits Checklist](#)

[SPOR compensation guideline](#)

[Financial considerations](#)

[Back to Pre-onboarding process](#)

Pre-onboarding considerations

Infrastructure and technology

Quick tip: There's no need to know everything right away. Start with what's essential, and build the rest together.

Get set up



Settle into your workspace (computer, internet, login info) and receive access to the main tools (like project platforms or shared drives).

Try it out



Log in, find tasks or files, and click around enough to feel curious. Ask the team questions to clarify anything that is confusing.

Learn how we work



Get introduced to how the team communicates (e.g., email, Slack), shares files, and documents decisions. Understand what's expected and where there's flexibility.

Ethics



Understand the basics of handling data responsibly and respecting privacy. Get to know where security or policy information is if needed.

Resources

[Virtual project management tools](#)

[POR resources & tools repository](#)

[Communication skills](#)

[Back to Pre-onboarding process](#)

Pre-onboarding considerations

Training and resources

Quick tip: There is no expectation to be an expert. Share what stands out, ask what's unclear, and build skills/knowledge through the process.



Explore the essentials

Look through key learning materials. There is no need to master it all — just get familiar with what's most relevant to the project.

Resources

[CIHR learning Modules](#)

[TeamMapps](#)

[POR resources & tools repository](#)

[Jargon buster](#)

[Patient oriented research glossary](#)

[Back to Pre-onboarding process](#)

Pre-onboarding considerations

Onboarding buddy

Quick tip: This isn't about formal mentoring. It's about having guidance and support to get settled in.



Meet the buddy

Have a conversation with the team to discuss mutual needs, expectations, and readiness.



Share and learn

Discuss responsibilities, time commitment, and contributions to the project.

Resources

[Communication skills](#)

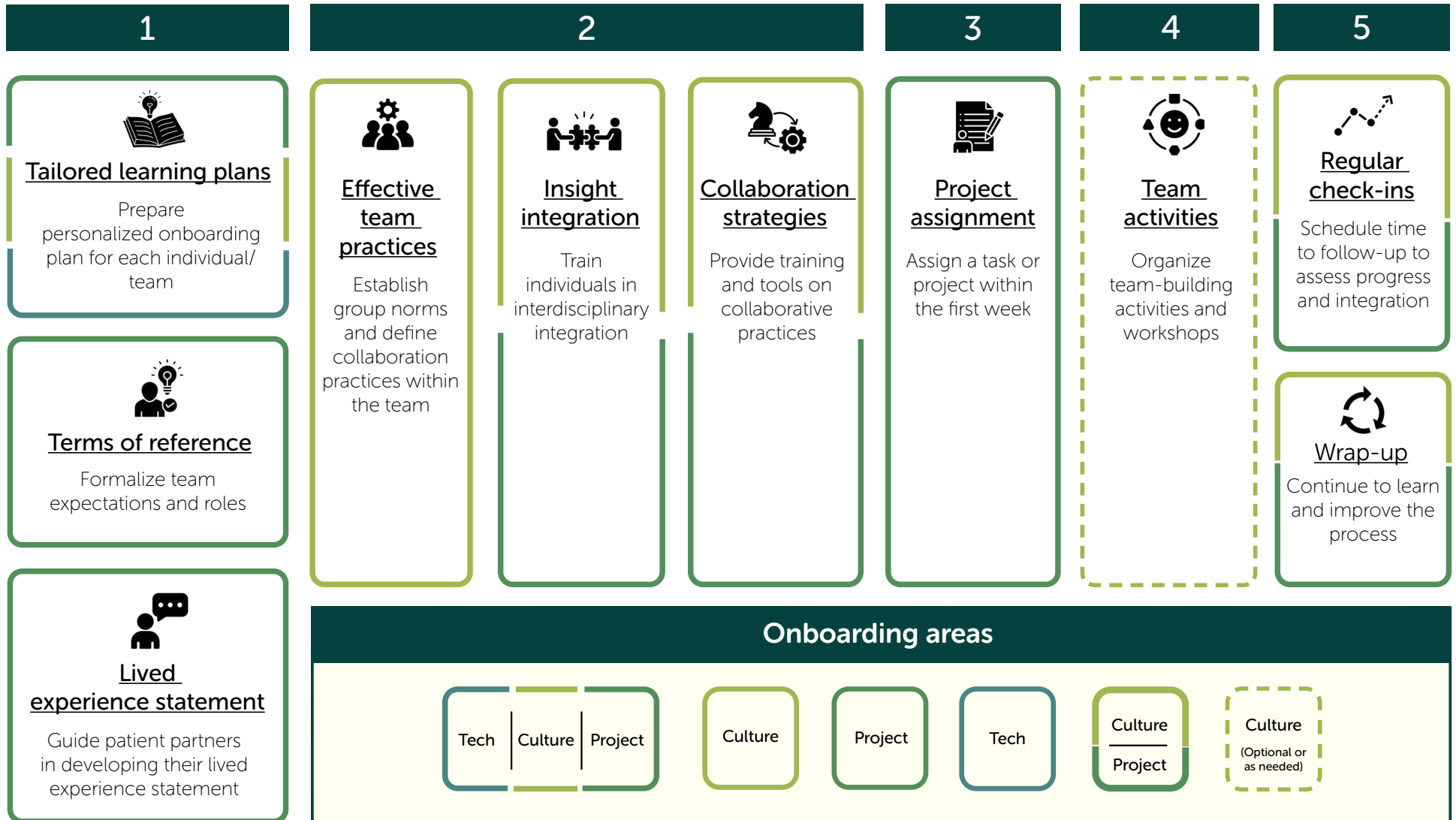
[Emotions check-in](#)

[Collaborative agreement](#)

[Back to Pre-onboarding process](#)

Onboarding process

Progression of onboarding



Regular checks-in and progress

Onboarding considerations

Tailored learning plans

Quick tip: Learning is part of the journey, not a box to check.



Get curious

Talk to a team member about what the learning expectations are and what support would help. It's more of a conversation than a checklist. Focus on your interests, the role, and comfort levels.



Explore resources

Access learning tools, resources, or trainings that match your goals (e.g., self-guided modules, mentorship, or hands-on practice). Ask questions and revisit things as needed.

Resources

[POR Resources & tools repository](#)

Back to Onboarding process

Onboarding considerations

Terms of reference

Quick tip: This is about co-creating understanding and accountability. Refer to, adapt, and revisit as the work together evolves.



Get on the same page

Talk about the purpose, goals, and how tasks connects to the project. This might be captured in a shared document like a Terms of Reference (TOR) or Memorandum of Understanding (MOU).



Clarify who does what

Review who is responsible for what—how decisions are made, what support looks like, and how you will stay connected. Everyone should understand their role and contribution.



Confirm agreement

Check that everything feels right, and if needed, sign off on a shared document. This gives everyone a point of reference to return to if things shift or questions come up.

Resources

[Collaborative agreement](#)

Back to Onboarding process

Onboarding considerations

Lived experience statement

Quick tip: There is no need to share everything—just know your perspective matters deeply. This is about building with, not speaking for.



Welcome what each person brings

The team acknowledges and makes space for lived experience in conversations. These stories are reflected upon and valued.



Create a brave and judgment free zone

Feel safe sharing openly, knowing everyone's insights are respected and protected.

Resources

[Dissemination plan](#)

[Back to Onboarding process](#)

Onboarding considerations

Effective team practices

Quick tip: Great teams are built with care. Talk things through, support each other, and check in often.

Create shared agreements



Have an open conversation about what matters to everyone—then agree on a few simple ways to work well together.

Agree on how to make decisions and how to handle conflict



Decide together what to do if there's disagreement. Create a clear and fair process everyone understands and trusts.

Set expectations for communication



Define what respectful communication means (e.g., listening actively, speaking openly, and including all voices). Agree on how to check in and adapt.

Resources

[Collaborative Agreement](#)

[Communication skills](#)

[TeamMAPPS](#)

[Identifying Issues](#)

[Structured decision making](#)

[Naming Feelings summary](#)

[Emotions check-in](#)

[Back to Onboarding process](#)

Onboarding considerations

Insight integration

Quick tip: Gathering insights is just the beginning. Use them to drive change, and loop back to see how things are going.

Capture insights clearly



Write down what people share—ideas, questions, concerns—and make sure everyone on the team can see and use it.

Use feedback to make decisions



When making big choices, the team checks back on what was shared and shows how feedback helped shape the path.

Make learning a two-way street



Everyone has a chance to help make sense of findings—through group analysis, writing together, or open discussion.

Resources

[Structured decision making](#)

[Toolbox for co-producing knowledge](#)

[Team Science](#)

[Thinking routine toolbox](#)

[Experience mapping toolkit](#)

[Hyper island toolbox](#)

Back to Onboarding process

Onboarding considerations

Collaborative strategies

Quick tip: Everyone has something to offer. Support each other to learn, grow, and contribute with confidence.



Build confidence to join in

There is sufficient time for preparation, speaking up is encouraged and contributions are acknowledged and built upon.



Practice working together

Work through challenges as a team, give kind feedback, and adjust how to support each other better.

Resources

[Team Science](#)

[Hyper island toolbox](#)

[Best practices for virtual patient engagement](#)

[Back to Onboarding process](#)

Onboarding considerations

Project assignment

Quick tip: Give a clear task early on to build confidence and to show that their contribution matters.



Get involved early

Tasks are clear and meaningful during the first week so that people can jump in with purpose.



Match people to the right role

Skills and interests are considered when tasks are shared, so the work feels like a good fit.

[Back to Onboarding process](#)

Help us identify resources

Do you know resources that would fit in this section? Let us know at: info@passerelle-nte.ca

Onboarding considerations

Team activities

Quick tip: Trust doesn't just happen—create regular moments for connection, reflection, and learning together.

Create space for
building trust



Take part in activities that help the team connect. People share what matters to them.

Help new people feel
part of it all



Join in on team activities early and start working with others on shared goals.

Learn how to work
better together



Notice what helps or hinders teamwork and adjust how people show up for others.

Resources

[Hyper island toolbox](#)

Back to Onboarding process

Onboarding considerations

Regular check-ins

Quick tip: Check in often—early feedback helps make onboarding smoother and more welcoming for everyone.



Ask for feedback

Check in with new members—through a quick conversation or short survey to see how things are going. Use their feedback to make the experience better for others.

Resources

[Emotions check-in](#)

[Naming Feelings summary](#)

[Back to Onboarding process](#)

Onboarding considerations

Wrap-up

Quick tip: A wrap-up is a valuable moment to capture feedback and insights that can improve the experience for future projects.



Take time to reflect

Debrief on the process and gather feedback on what worked and what could be improved for the next time.

Resources

[Partnership Reflection](#)

Back to Onboarding process

Final thoughts

Building a culture of inclusivity

Onboarding is not just about integrating new individuals—it's about creating an environment where everyone feels valued and supported. While the process takes time, the investment pays off. By following this guide, you are contributing to a culture of collaboration, inclusion, and shared expertise—where diverse perspectives and lived experiences are harnessed to solve complex problems in health research.



We want to hear from you!

We are always looking for feedback and ways to improve. If there are resources you think should be included or if there are any other ideas you have to bring to the table, please do not hesitate to connect with us. **Contact us at:** info@passerelle-nte.ca

Acknowledgments

We would like to express our sincere appreciation to everyone who contributed to the creation of this onboarding guide. This document represents a collaborative effort that draws upon the expertise, dedication, and insights of a remarkable group of individuals committed to fostering inclusion and belonging. A special thank you to the following contributors:

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Partners

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Canada Research Chair
in Knowledge Mobilization
and Integration in Practice



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