CTR Portal - Update Project Record

A study staff member actively assigned to a project has the ability to make certain modifications to the project record, including:

- Adding, or inactivating study staff/personnel
- Adding documents
- Adding Notes

The following information illustrates how to complete each type of modification.

Note: CTR Portal Support can assist in updating additional project information outlined in the CTR Portal Project Update Form.

Add/Inactivate Personnel:

To add personnel on a project, navigate to the Personnel tab within a project record.

Adding new personnel to a project

1. On the Personnel tab, select the Add Personnel button; the user will be directed to the New Project Personnel screen.
2. Complete the information on the New Project Personnel screen:

- **User**: Search by last name, first name, or x500 by typing in this field (minimum of 3 characters). Select the user from the drop-down once they have been found.
- **Role**: Select all study staff roles that apply to the user. **Multiple roles can be selected in this field.** Available study staff roles include: Accountant, Co-Investigator, Community Organization Study Staff, Contact for Biostatistical Services, Invoice Contact, PI Correspondance, Principal Investigator*, Protocol Contact, Research Team Member, Scheduler*, or Study Coordinator.

![New Project Personnel for 999999](image)

- **Grant Scheduling Access**: This button will assign the Scheduler role to the user, which allows the user to access the CTR Portal’s Scheduling System for the project. For projects that have been approved to use the Scheduling System, this role requires PI authorization.

Inactivating personnel on a project

1. Complete the Access Request Form on the [CTSI Forms and Template page](#).
Add Documents
To add documents for the project, navigate to the Documents tab within a project record.

Adding new documents to a project

1. On the Documents tab, select the **Upload** button; the user will be directed to the Upload Documents screen.

2. Click on **Add files** button and select a file to upload.

3. Select a file **category** before selecting **Start upload** button.
   - Access Request Form - Used to request the addition or removal of study staff in the CTR Portal
Clinical and Translational Science Institute

- Case Report Form - Case Report Forms
- Clinical Documents - Logs, Physician Orders, Flowsheets, lab documents
- Communications - Emails, letters, meeting notes
- Cost Estimate - Detailed estimate of fee-for-service costs of services
- Credentials - CV, licenses, other regulatory documents
- Financial Documents - Contracts, Cost estimates, budgets, payment schedules
- IDE - Investigational Device Exemption (IDE)
- IND - Investigational New Drug (IND) Application
- IRB - Correspondence, change forms, Approvals, Annual Reports
- Info given to Study Subjects - Consent Forms, HIPAA, recruitment material
- Investigational Product (IP) - Investigator Brochure, Documentation, instructions, sample labels
- Monitoring Report - Reports, close out, pretrial
- Other - Other documents related to the project or a specific request for services including DSMP's
- Protocol - Protocols, amendments, appendices, protocol administrative/clarification letters
- Protocol Summary - Protocols, amendments, appendices, protocol administrative/clarification letters
- Publications - Post Study Publications
- Randomization Documents - Decoding documentation, randomization list
- SAE/AE - Reports, Logs, forms
- Signed agreements - Sponsor, Institution, ARO, CRO, SMO
- Subject Information - Subject List, enrollment log, screening log