

# Quick Guide: Add Study Staff

Clinical Translational Research (CTR) Portal



## Introduction

Study staff who are already assigned to a given project in the CTR Portal may add additional study staff members electronically by utilizing the Add Personnel tool in the Personnel tab of the My Projects module. The available personnel roles are listed here:

- Principal Investigator\*
- Co-Investigator
- Study Coordinator
- Protocol Contact
- Research Team Member
- Invoice Contact
- Accountant
- Contact for Biostatistical Support
- Community Organization Study Staff
- PI Correspondence
- Scheduler\*\*

*\*Requires a confirmation from the current PI and/or IRB documentation to support the change in PI.*

*\*\*Requires PI authorization. Allows study staff to schedule events in the CTR Portal's Scheduling System.*

## Scheduling Access

Study staff may also request scheduling access privileges through this tool. Scheduling access requires PI authorization. If requested electronically through this tool, then the PI will receive a confirmation via email with instructions on how to approve the request. Alternatively, staff may utilize the Access Request Form located on the [Forms, Templates and User Guides](#) page of the CTSI website.

# Adding Study Staff

## Step 1 - Find the project

From the CTR Portal home page enter the project's **CTR Portal #** in the **My Projects - Quick View**, and select **GO**. Then, select the # from the results.

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## Clinical Translational Research Portal

Portal Home >

Please fill out the NIH reporting form [here](#)

### My Service Requests

To view existing service requests or to initiate a new service request see [My Service Requests](#).

[My Service Requests](#)

### My Projects - Quick View

Search to limit results  [GO](#)

Note: Searchable fields include CTSI ID, TASCs #, IRB#, PI, and Short Title. To view more details on your project click on the CTSI ID or on My Projects in the top menu.

[CTSI ID: 999999](#) PI:

TASCs#: none CTSI Status: Registered

IRB:#

### Portal News and Announcements

Welcome to the Clinical Translational Research (CTR) Portal. Check here for important information about the Portal, including new features, known issues, and issue resolutions. Questions, suggestions, and enhancement requests can be submitted by clicking on the "Need Help" icon above.

[Frequently Asked Questions](#)

[Forms, Templates, and User Guides](#)

### CTSI News and Information

Not available

Next, the CTR Portal will redirect to the Projects Search page for confirmation. Click on the record in the results:

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# CTSI

## Clinical Translational Research Portal

[Portal Home](#) > [My Projects](#)

### Project Search

Search by:  Title:

**Note:** Searchable fields include CTSI ID, TASCs #, IRB #, CPRC #, BDAC #, and IACUC #.

Last Name:  First Name:

Project Status:

**Can't find the project you're looking for?**

It may be because you are not actively assigned to the project or because the project hasn't yet been registered within the Clinical Translational Research Portal. For assistance please send a message to CTSI using the 'Need Help' button in the top left corner of the menu bar.

Records 1 - 1 of 1 | [First](#) | [Prev](#) | [Next](#) | [Last](#) | Page:  of 1 | Per Page:

CTSI ID	TASCs #	IRB #	Short Title	PI Name(s)	CTSI Status	Actions
999999					Active	<a href="#">Request Services</a>

Records 1 - 1 of 1 | [First](#) | [Prev](#) | [Next](#) | [Last](#) | Page:  of 1 | Per Page:

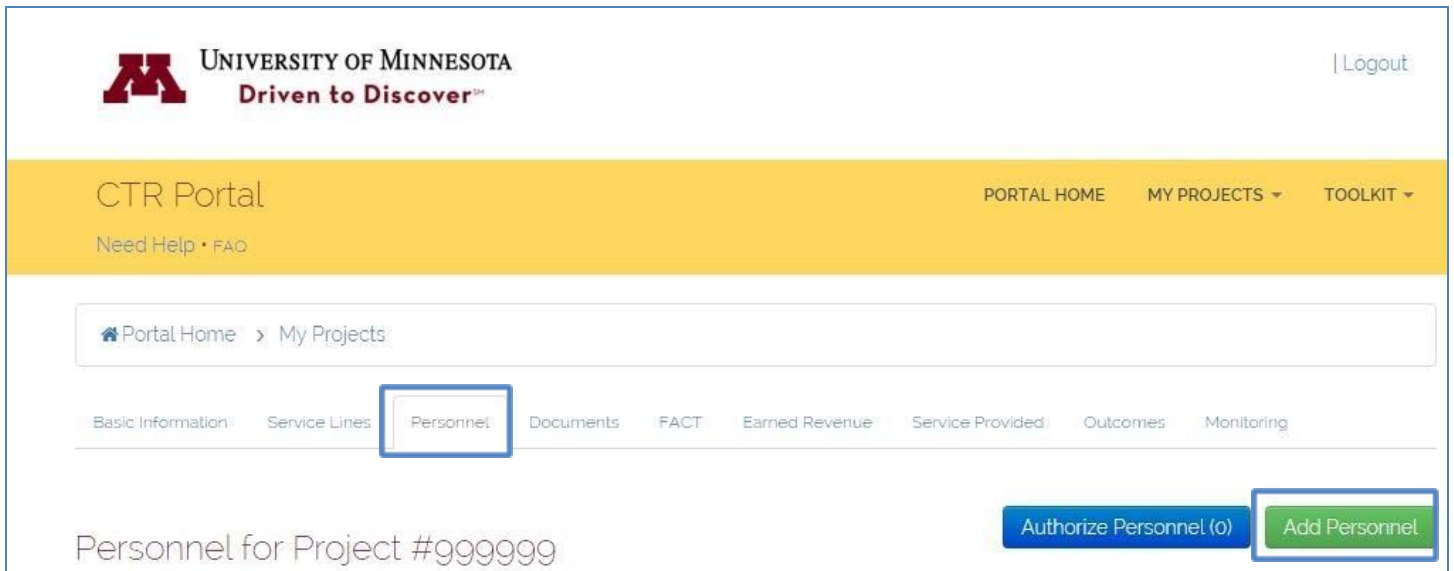
[Need Help](#) | [Recommended Browsers](#) | [Frequently Asked Questions](#) | [Forms, Templates, and User Guides](#)

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## Step 2 – Access the Add Personnel tool

From the project record select the **Personnel** tab. Then select the **Add Personnel** button:

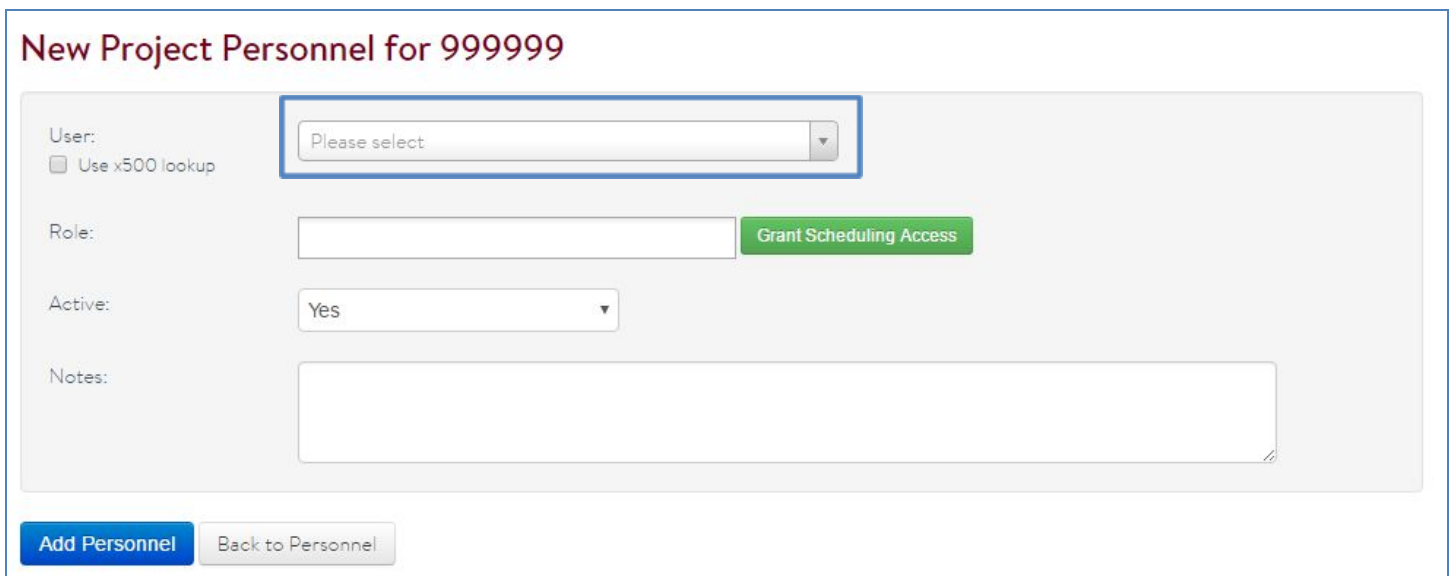


The screenshot shows the University of Minnesota CTR Portal interface. At the top left is the University of Minnesota logo with the text "UNIVERSITY OF MINNESOTA Driven to Discover™". To the right is a "Logout" link. Below this is a yellow navigation bar with "CTR Portal" on the left and "PORTAL HOME", "MY PROJECTS", and "TOOLKIT" on the right. Underneath the navigation bar is a breadcrumb trail: "Portal Home > My Projects". A horizontal menu contains several tabs: "Basic Information", "Service Lines", "Personnel" (which is highlighted with a blue box), "Documents", "FACT", "Earned Revenue", "Service Provided", "Outcomes", and "Monitoring". Below the menu, the text "Personnel for Project #999999" is displayed. On the right side of this section, there are two buttons: "Authorize Personnel (0)" and "Add Personnel" (which is highlighted with a green box).

*Note: The **Authorize Personnel** button is only available to the Principal Investigator. This allows the PI to authorize scheduling access for study staff in the Scheduler role.*

## Step 3 – Find and add the study staff member

Search for the staff member by x500, first name, or last name in the **User** field:



The screenshot shows a form titled "New Project Personnel for 999999". The form has several fields: "User:" with a dropdown menu showing "Please select" (highlighted with a blue box) and a checkbox for "Use x500 lookup"; "Role:" with a text input field and a green "Grant Scheduling Access" button; "Active:" with a dropdown menu showing "Yes"; and "Notes:" with a large text area. At the bottom of the form are two buttons: "Add Personnel" and "Back to Personnel".

The user list is prepopulated with all CTR Portal users. If you are unable to find the staff member in the User field, then you can add them by using the x500 lookup feature. Check the **Use x500 lookup** checkbox, and enter the user's x500:

### New Project Personnel for 999999

User:   Use x500 lookup  
if you don't know the user's x500 you can look it up [here](#).

Role:

Active:

Notes:

If you don't know the user's x500, then click the hyperlink below the x500 field:

### New Project Personnel for 999999

User:   Use x500 lookup  
if you don't know the user's x500 you can look it up [here](#).

Role:

Active:

Notes:

### User lookup

Include student and guest accounts



Select all applicable roles. If the user requires scheduling access select the **Grant Scheduling Access** button. This will add the Scheduler role to the staff's list of roles. Select the **Add Personnel** button when complete:

### New Project Personnel for 999999

User:

Use x500 lookup

Role:

Active:

Notes:

*Note: Scheduling access requires PI authorization. If you are not the PI a pending hold will be placed on the Scheduler role until the PI provides authorization. Reference the Scheduling Access section above for more information.*