Clinical and Translational Science Institute

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.*

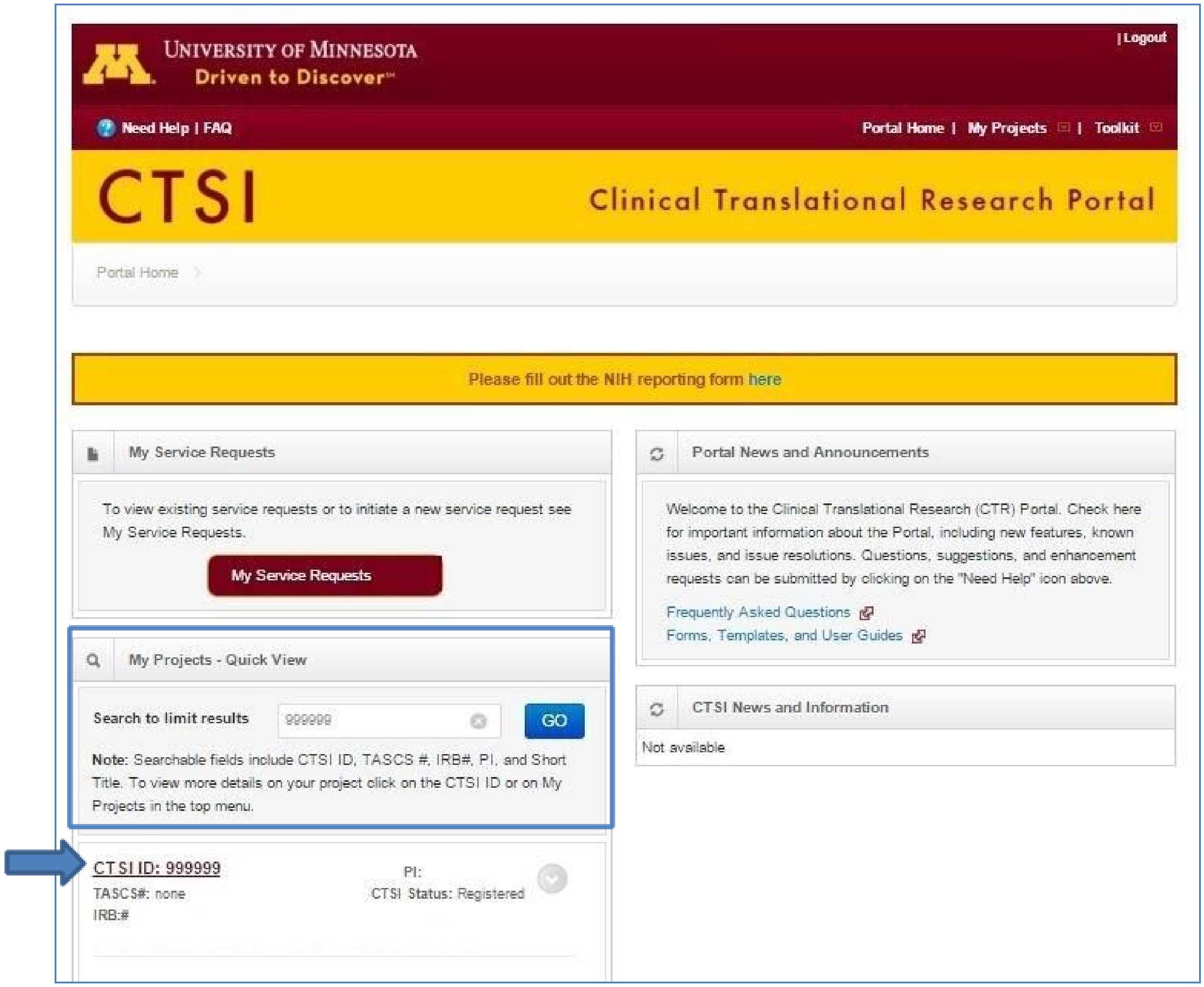
Scheduling Access

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

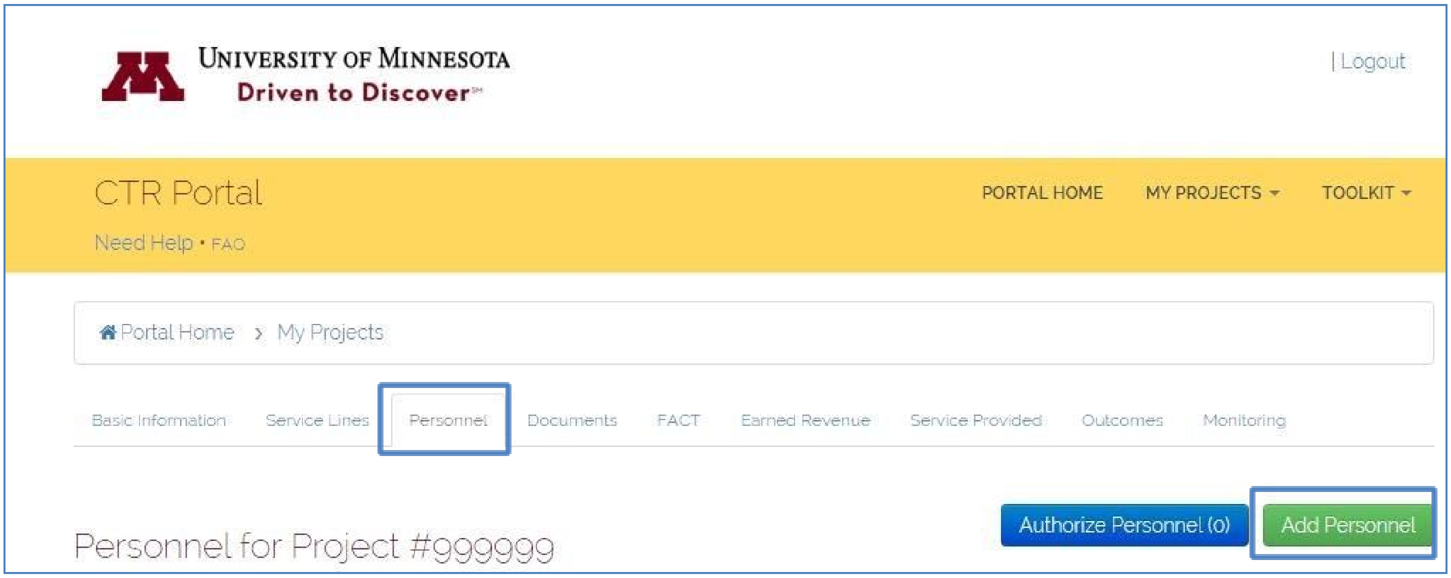
From the CTR Portal home page enter the project's **CTR Portal #** in the **My Projects - Quick View**, and select **GO**. Then, select the # from the results.



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

Step 2 – Access the Add Personnel tool

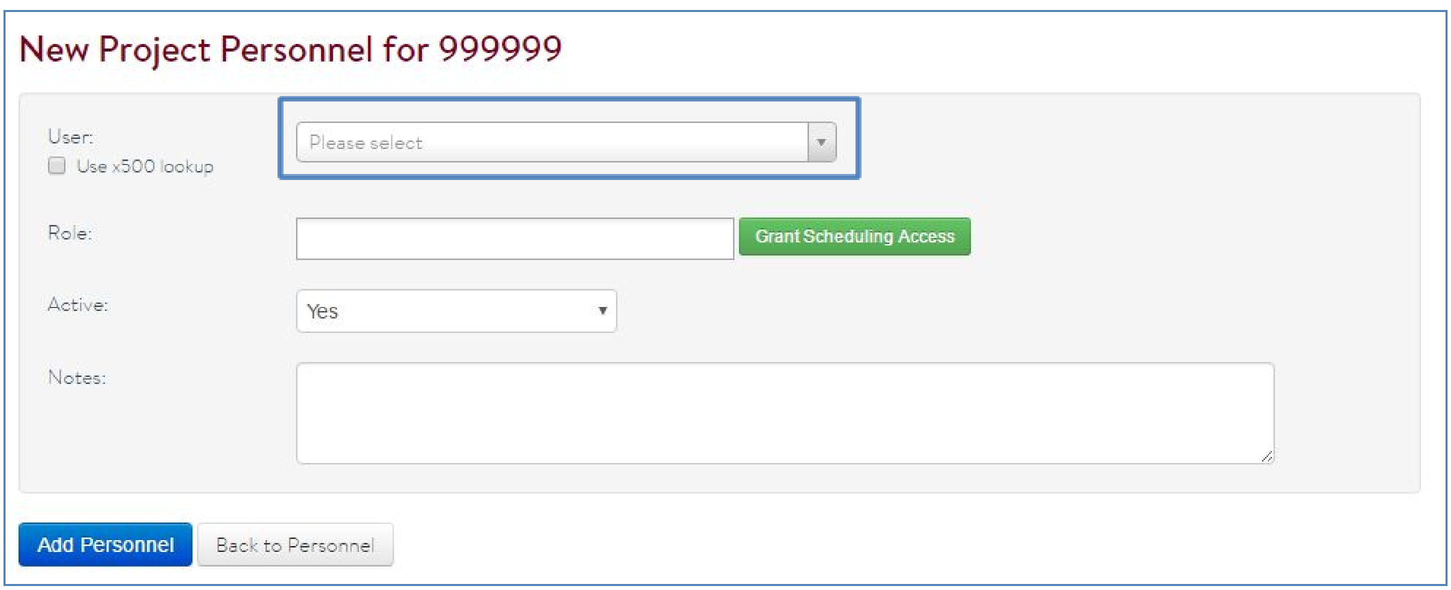
From the project record select the **Personnel** tab. Then select the **Add Personnel** button:



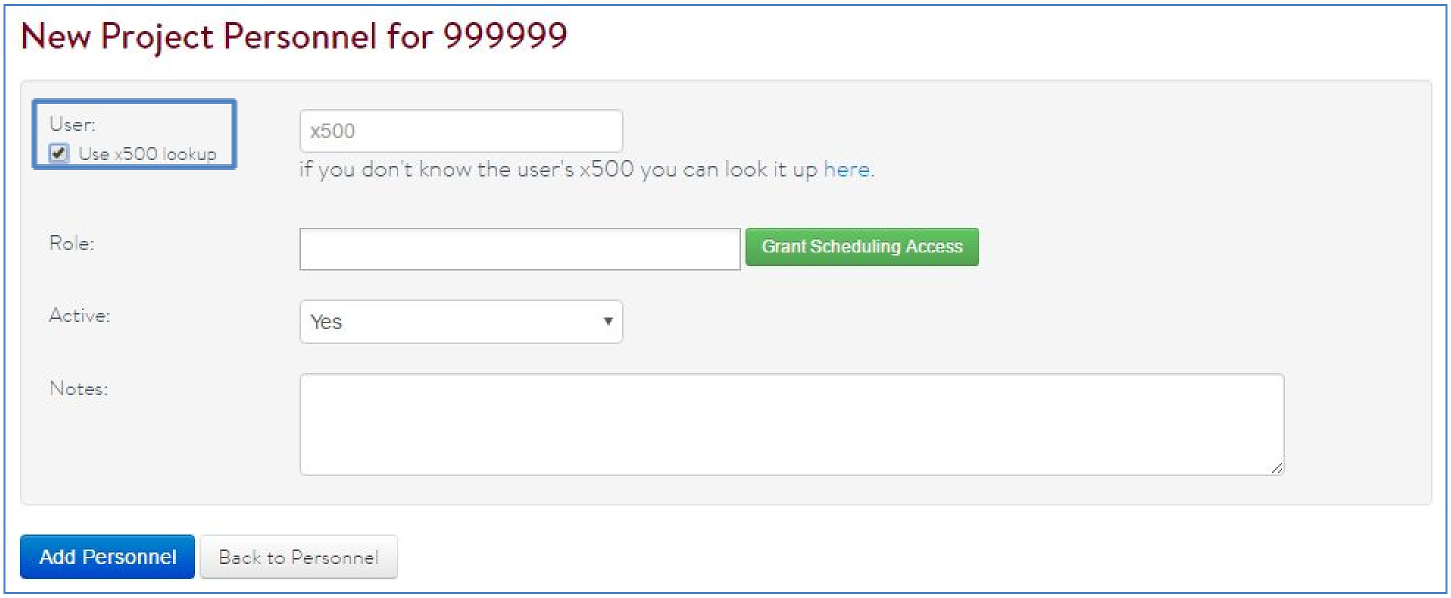
Note: The ***Authorize Personnel*** *button is only available to the Principal Investigator. This allows the PI to authorize scheduling access for study staff in the Scheduler role.*

Step 3 – Find and add the study staff member

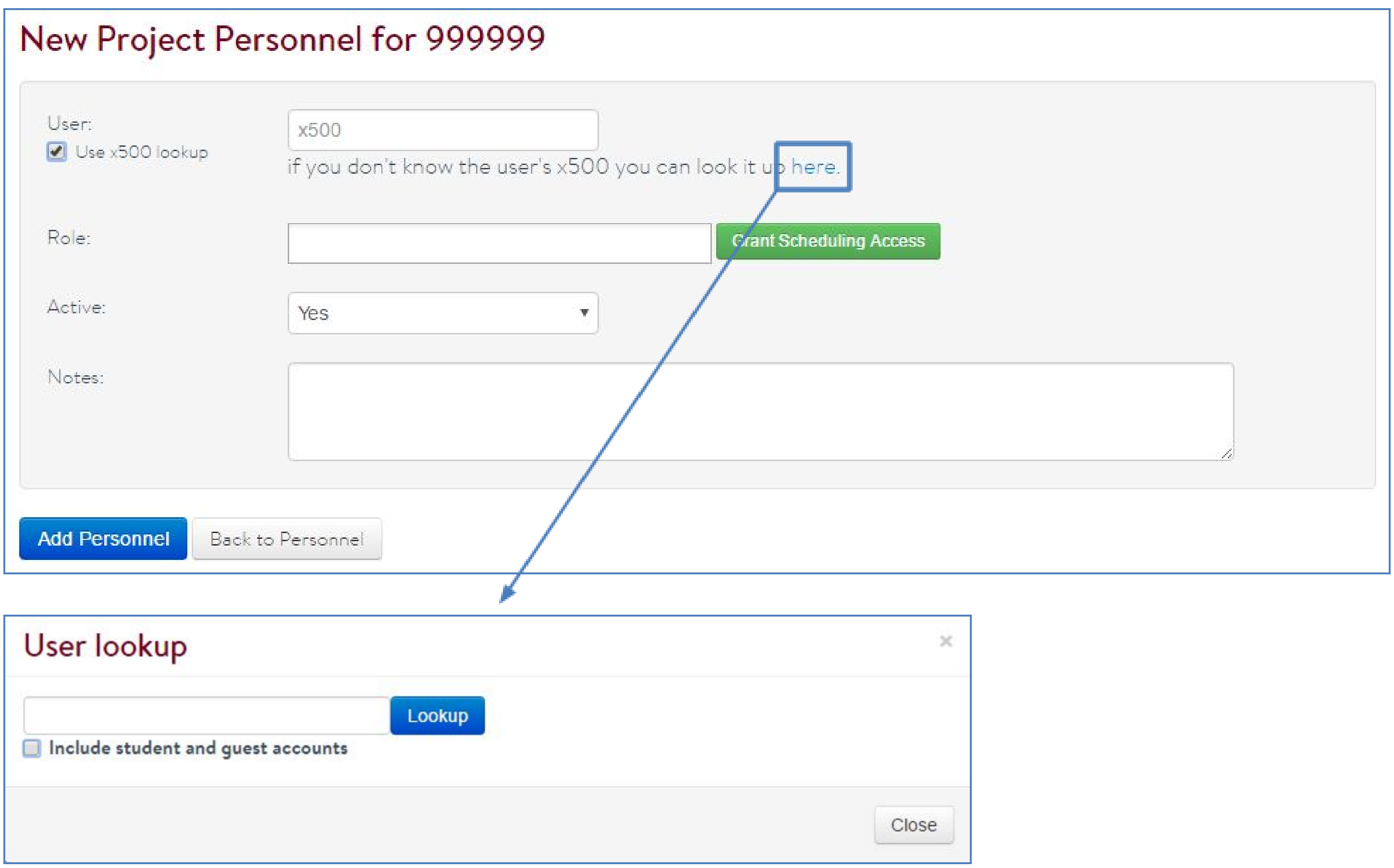
Search for the staff member by x500, first name, or last name in the **User** field:



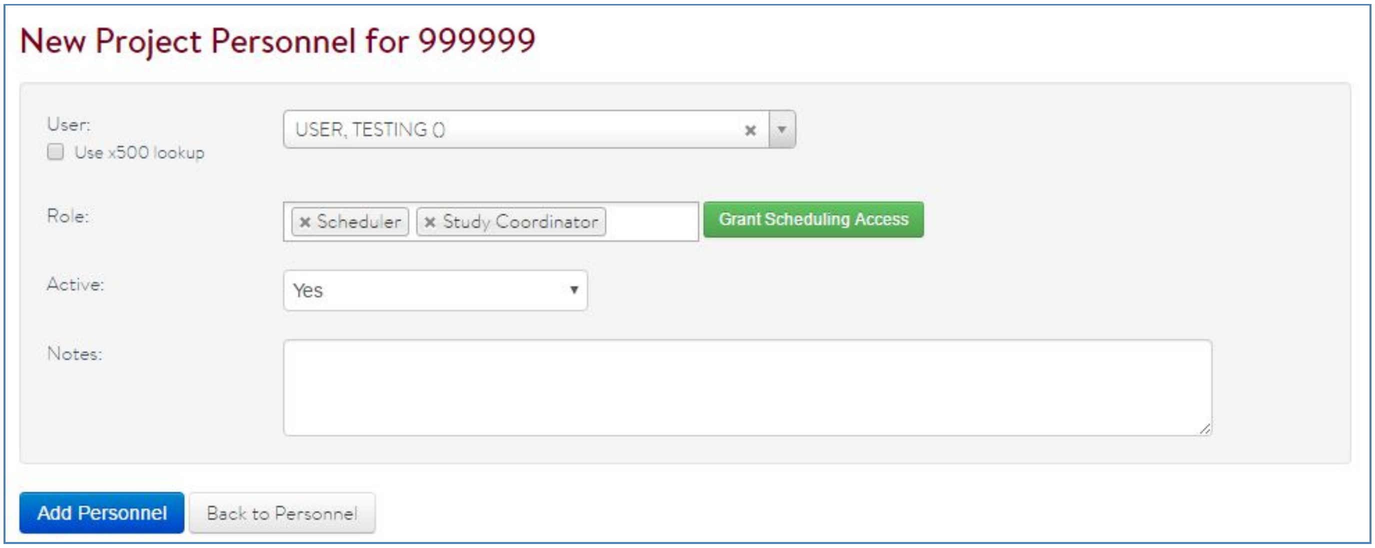
The user list is prepopulated with all CTR Portal users. If you are unable to find the staff member in the User field, then you can add them by using the x500 lookup feature. Check the **Use x500 lookup** checkbox, and enter the user's x500:



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



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:



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.