

# How to Create an Organization

CTMS version 3.0

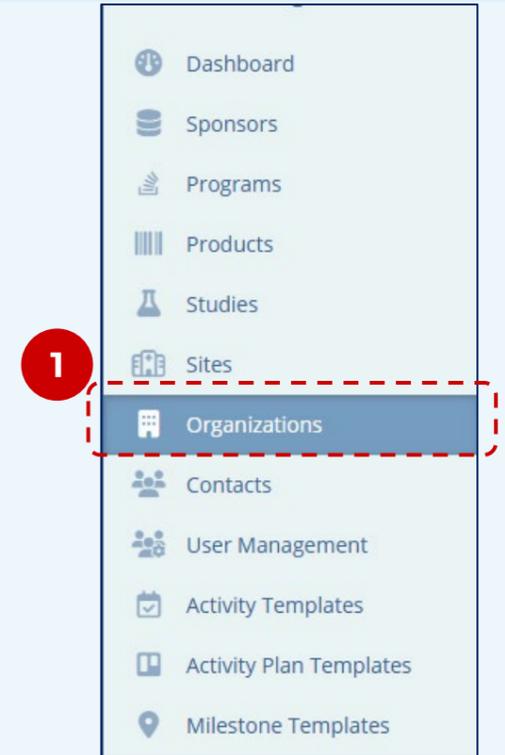
## APPLICABLE TO:

- Company Admin
- Study Manager
- CRA

**\*\*This job aid discusses manual creation of a single entity. For instructions on how to bulk import organizations, please see the relevant job aid.\*\***

**1** Log into the CTMS and click on **Organizations** from the menu on the left.

**2** To add a new Organization, click **Add**.



**3** Enter the organization details, then click **Create** when finished, or **Create and Add Another** to add an additional Organization.

**Note:** These instructions are the same for creating a Sponsor, which is a type of Organization. However, a Sponsor may also be created from the Sponsors area. Please see the associated job aid for additional information.

The 'Create Organization' form includes the following fields and options:

- General Information:**
  - Name\*
  - Number\*
  - Parent (dropdown)
  - Type\* (dropdown) and Subtype (dropdown)
  - Status\* (Active)
  - Primary Contact (dropdown)
- Phone Numbers:** Add button
- Notes:** Rich text editor with formatting options (B, I, U, S)
- Include Address:** Toggle switch
- Buttons:** Cancel, Create and Add Another, Create