

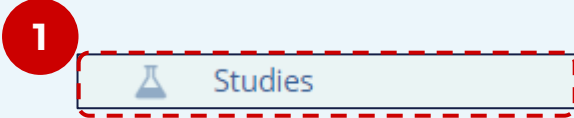
How to Create Sites within a Study



CTMS version 3.1

- APPLICABLE TO:
- ☒ Company Admin
 - ☒ Study Manager
 - ☐ CRA

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

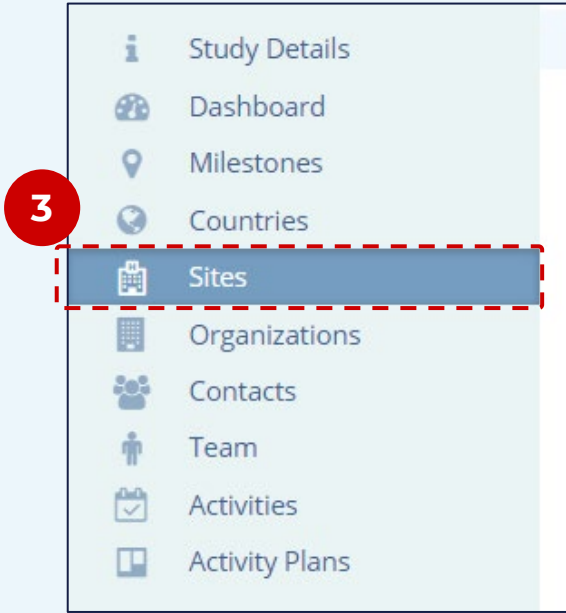


2 Select and open a study by clicking on the Study name.

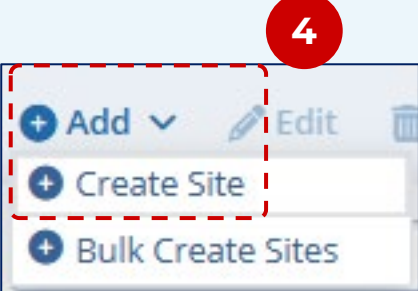
35 Studies 1 Selected

	Name	Protocol Number	Status
<input checked="" type="checkbox"/>	MM203	001202319202	PLANNED

3 Click **Sites** from the menu on the left.



4 To add a new **Site**, click **Add** and select **Create Site**.



Note: For bulk creation of sites, please see page 2 of this job aid.

5 Enter the Site details, then click **Create** to save, or **Create and Add Another** to add an additional site.

Note: The site creation process requires that the site be associated with an organization. For standalone sites, the site itself is its own organization.

Create Site

General Information

Study*
Astromedia32021-1

This is a satellite site ☐

Site Number* Principal Investigator*

Site Name

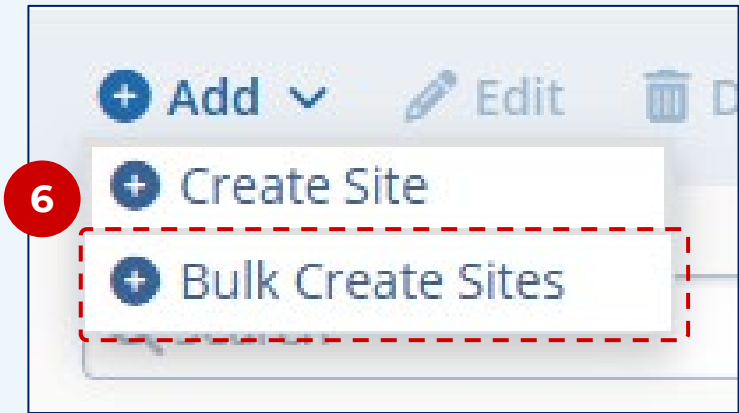
Site Organization*

Site Location*

Status* Status Date*
New 30 Aug 2021

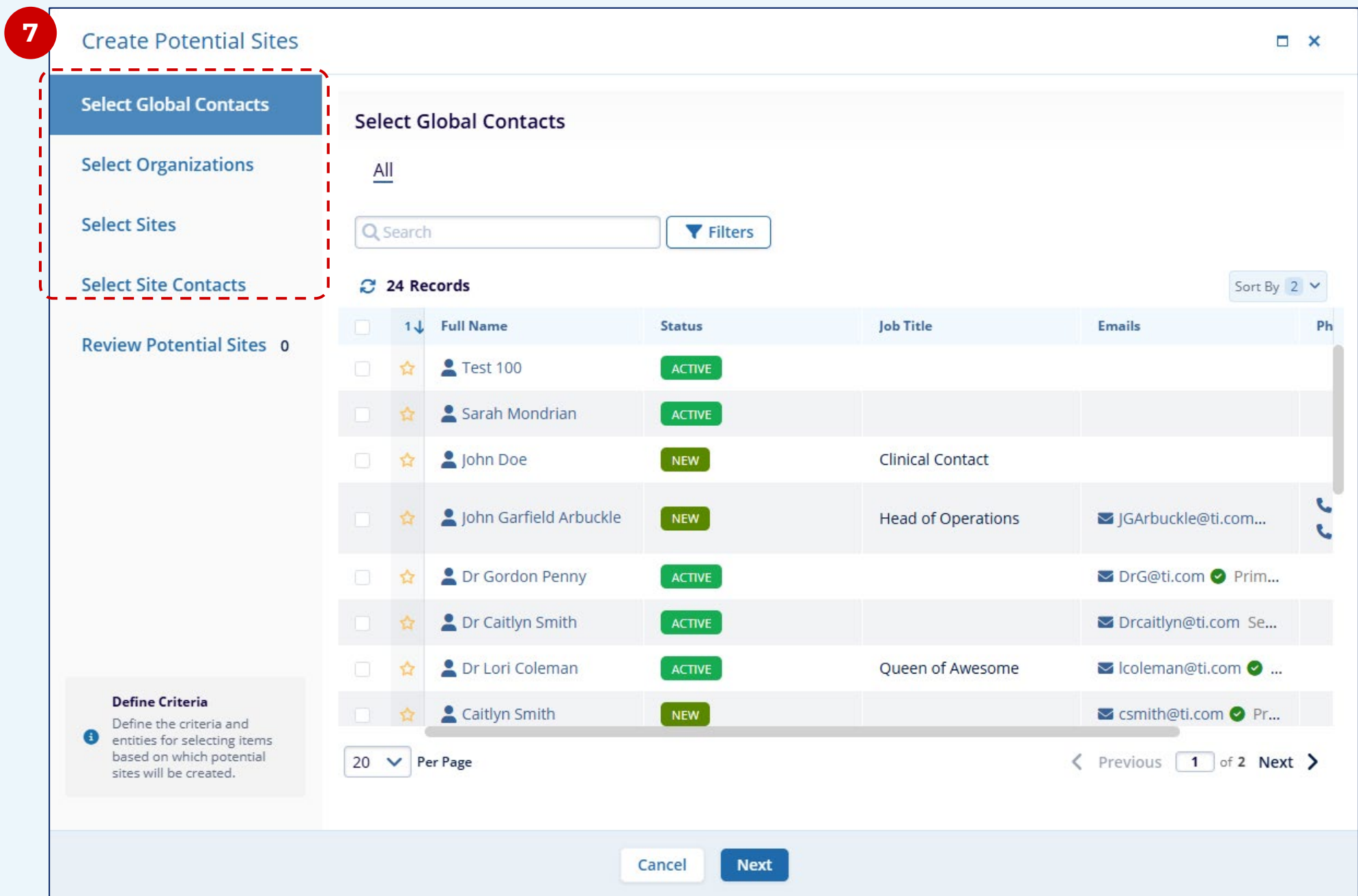
Cancel Create and Add Another Create

6 To create multiple sites at once, select **Bulk Create Sites**.



Note: Bulk creation of sites depends upon some information having been already entered into the system such as a PI, an Organization, or a site used in another study.

7 When the **Create Potential Sites** window opens. Select what information should be used in the creation of sites. You can select existing Organizations, Sites, or Contacts on which to base the creation of your new sites.



8 Once you have selected the relevant information on which to base the creation of new potential sites, use the Review Potential Sites area to determine if the list of sites to be created is correct. Duplicate, or unnecessary sites can be removed from the list at this point if needed.

Create Potential Sites

Select Global Contacts

Select Organizations

Select Sites

Select Site Contacts

Review Potential Sites

4

Review Potential Sites

Check the list of potential sites that will be created

Potential Sites Status ?
Potential

⚠ Required custom fields will not be populated for site creation

Remove

4 Sites 1 Selected

<input type="checkbox"/>	Investigator	Status	Organization
<input type="checkbox"/>	Sarah Mondrian	POTENTIAL	
<input type="checkbox"/>	John Garfield Arbuckle	POTENTIAL	Fox Chase Cancer Center
<input type="checkbox"/>	Samuel Vimes	POTENTIAL	Sunshine Sanctuary Healthcare
<input checked="" type="checkbox"/>	Samuel Vimes	POTENTIAL	Training Org #1

Define Criteria

Define the criteria and entities for selecting items based on which potential sites will be created.

Cancel

Previous

Create 4 Potential Sites

9 When you have confirmed that the list is correct, press the **Create Potential Sites** button to create the sites

******Once the required sites have been created, the Study Manager should ensure that all personnel who need access to perform actions at the site-level (such as CRAs) should be granted the required permissions as these rights are not granted automatically by a user’s system access role.

For additional information regarding awarding access permissions, please see the related job aid or video.

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