

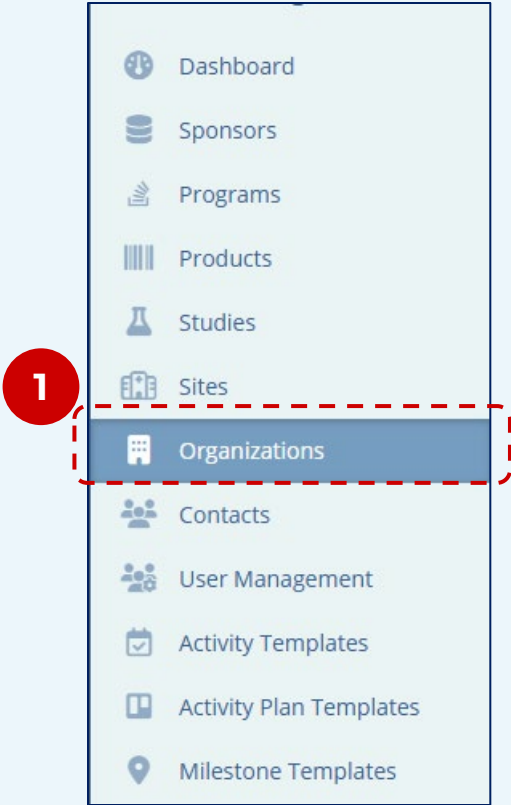
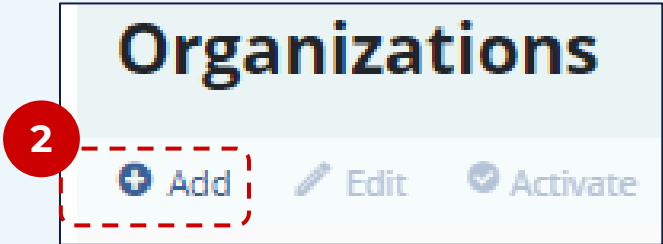
- APPLICABLE TO:
- Company Admin
 - Study Manager
 - CRA

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

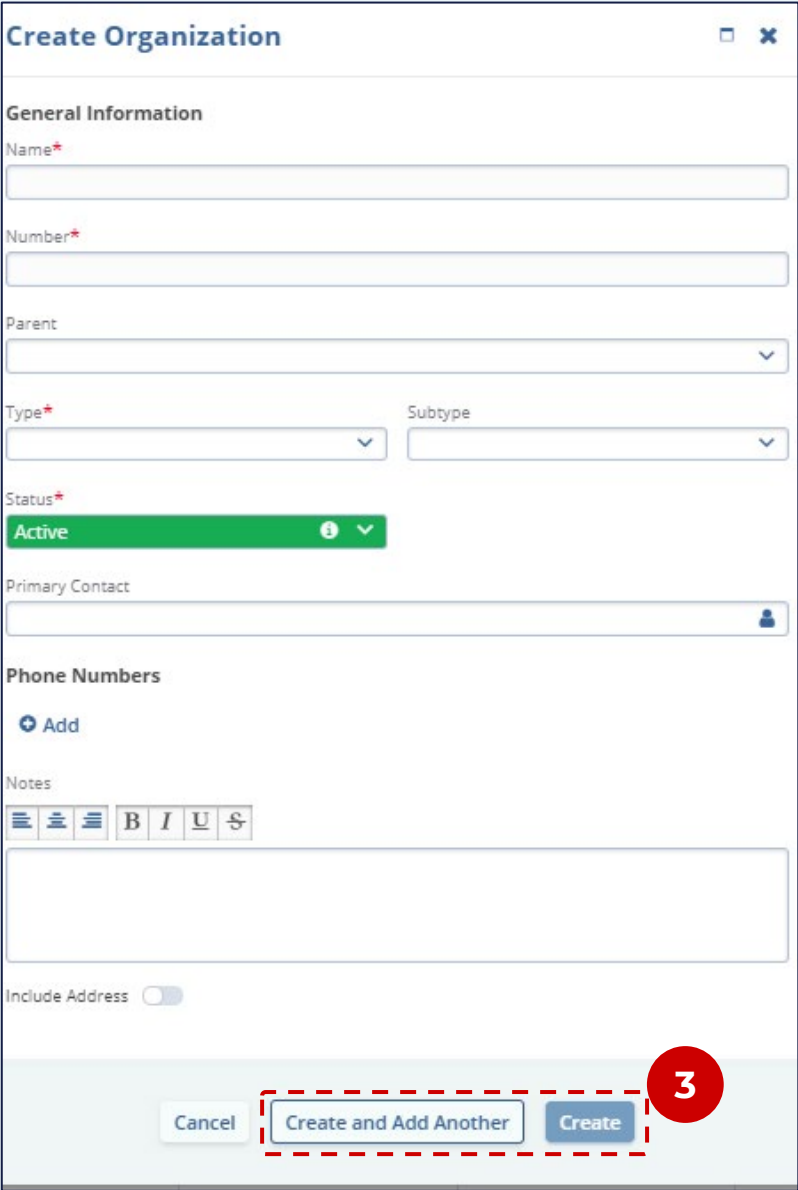
Maintaining an accurate list of organizations at the Global level in the CTMS allows users to import the information wherever required, ensuring consistency of information at all levels of the data hierarchy and avoiding errors and time expenditures inherent in repetitive entry of the same information.

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.

A screenshot of the 'Create Organization' form. The form has a title bar 'Create Organization' with a close button. It contains several sections: 'General Information' with fields for Name*, Number*, Parent (dropdown), Type* (dropdown), Subtype (dropdown), Status* (dropdown with 'Active' selected), and Primary Contact (text field with a user icon). Below this is a 'Phone Numbers' section with an 'Add' button. Then a 'Notes' section with a rich text editor (B, I, U, S icons). At the bottom is an 'Include Address' toggle switch. At the very bottom are three buttons: 'Cancel', 'Create and Add Another', and 'Create'. The 'Create and Add Another' and 'Create' buttons are highlighted with a red dashed box and a red circle with the number '3' next to it.

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.