

# How to Edit an Organization

CTMS version 3.1

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

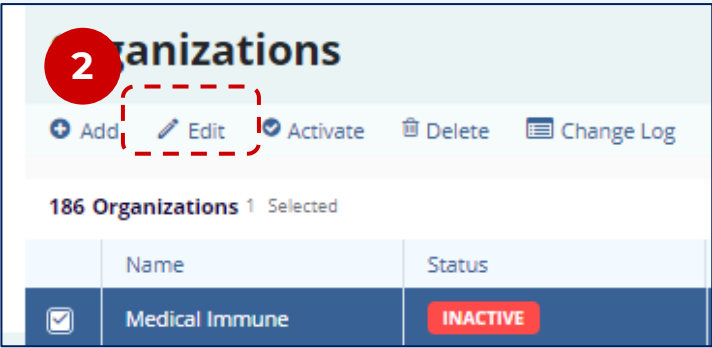
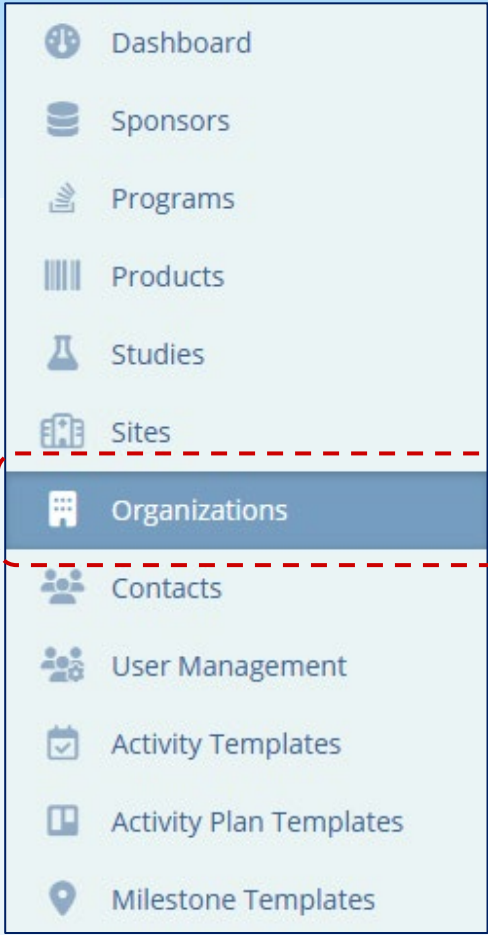
1 Log into the CTMS and click on **Organizations** on the left.

2 Select an organization from the list shown and then click **Edit** in the menu bar above the list. This allows the user to edit the organization's information in the quick-view panel at the right side of the screen.

Alternately, you could click on the *name* of the organization to be taken to the organization's page and then click **Edit** to edit on there instead.

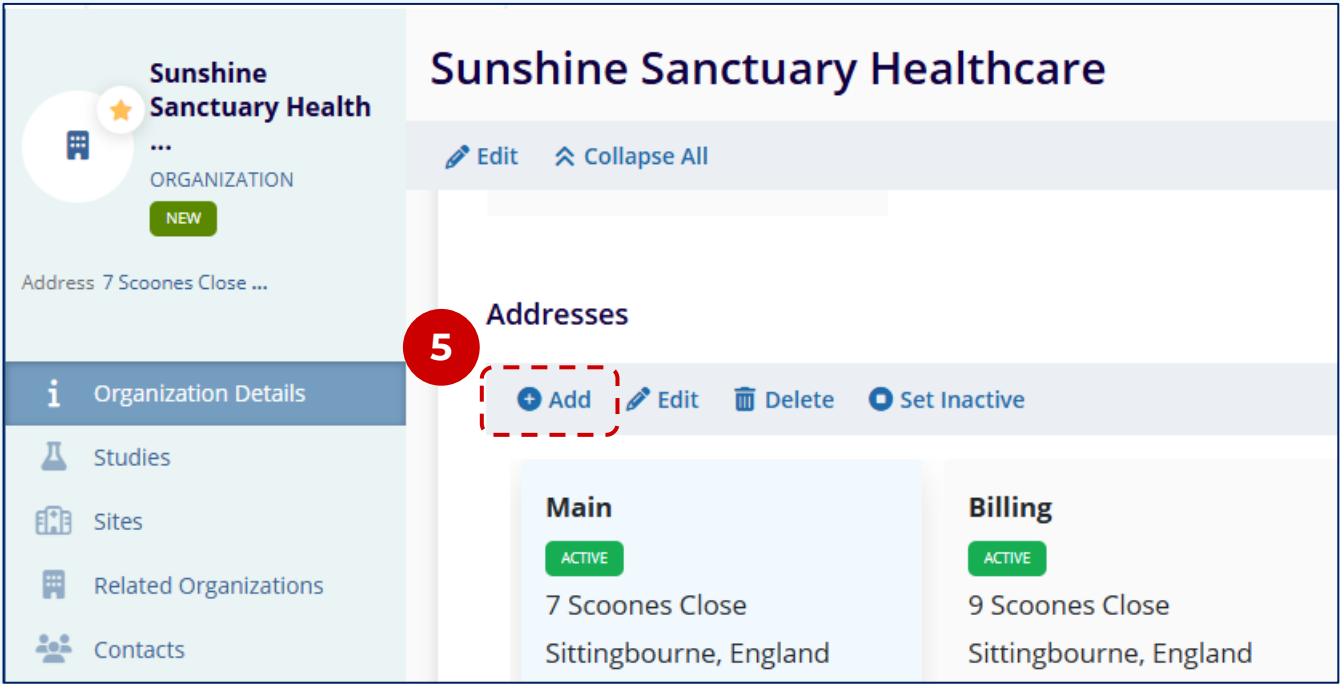
3 Make any necessary changes and then click **Save**.

**\*\*It is particularly important to make sure that all organizational addresses are entered into the CTMS. This is especially true if the organization represents one or more sites.**

A screenshot of the 'Medical Immune' organization quick-view panel. The panel shows the organization's name, status (INACTIVE), and a 'Dial' button. Below this is the 'Organization Information' section with fields for Number (#68989234), Status (Inactive), Name (Medical Immune), Parent (AAA Clinic), Type (Sponsor), Subtype (Local), and Description (Vaccine manufacturer, covid.). There is also a 'Notes' section with a text area and a 'Primary Sponsor' field. At the bottom, there are three buttons: Cancel, Save (highlighted with a red dashed box and a red circle with the number 3), and Save & Next.

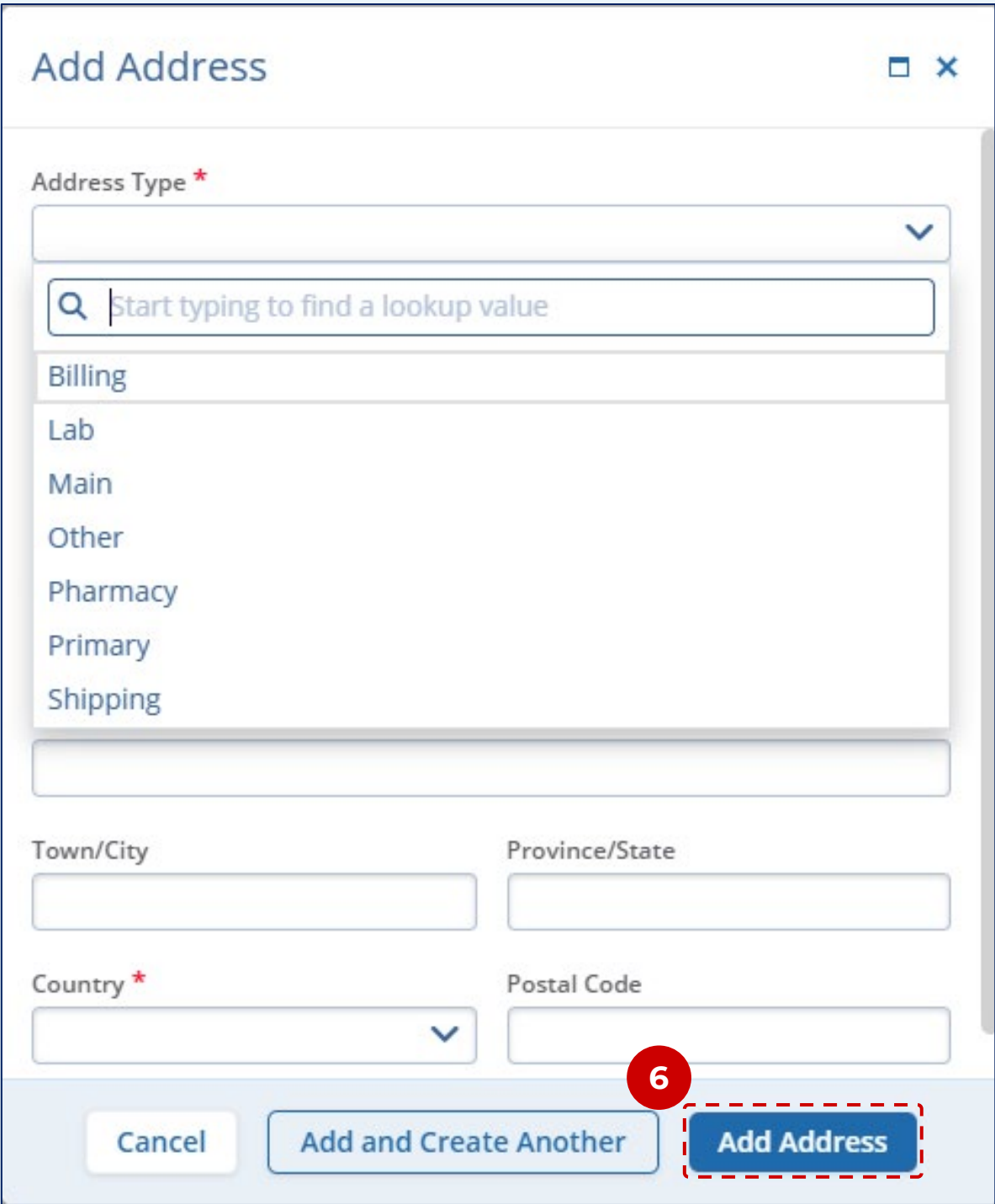
4 To update an organization’s list of addresses, navigate to the organization’s record directly (by clicking on the name of the organization in the list shown earlier) and scroll down to view the Addresses area of the Organizational Details.

5 Press the **Add** button.



6 Choose the Address Type, enter all required information, and press **Add Address**.

Once you have completed this process, the address will be included in the list of organizational addresses.

A screenshot of the 'Add Address' form. The form has a title bar with 'Add Address' and a close button. The first section is 'Address Type \*', which is a dropdown menu. Below it is a search bar with the placeholder text 'Start typing to find a lookup value'. The search results show a list of address types: Billing, Lab, Main, Other, Pharmacy, Primary, and Shipping. Below the search results is a text input field. The second section contains four input fields: 'Town/City', 'Province/State', 'Country \*' (a dropdown menu), and 'Postal Code'. At the bottom of the form are three buttons: 'Cancel', 'Add and Create Another', and 'Add Address'. The 'Add Address' button is highlighted with a red dashed box and a red circle containing the number '6'.