

Global Database Requests Refresher Training

Requesting Changes to Global Contact and Account Information

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FROM THOUGHT LEADERSHIP
TO CLINICAL PRACTICE

The Basics



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Before entering ANY new information in the CTMS, be sure to do a *thorough search* to make sure it is not already there!

- Use the **Search** tool at the top of any list to search in multiple ways (by location, by PI assigned, by email address, etc.)
- When adding a *new* Contact or Account
- When adding new details to an *existing* Contact or Account

The screenshot illustrates the CTMS interface with three red arrows highlighting key search and update features:

- Arrow 1:** Points to the 'Active Only' filter dropdown in the main contact list.
- Arrow 2:** Points to the search icon in the 'Add Address' modal window.
- Arrow 3:** Points to the 'Update Address' button in the 'Contact Addresses' section.

Main Contact List:

Role	Last Name	First Name	Office/Dept.	Address Line 1	Address Line 2	City	Prov/State
Study Coordinator	Gibson	Ross	Madison Co...	1150 Reserv...	Ste...	Halifax	NS
		Robert	Saint Johns ...	1879 Madiso...		Bridgewater	NS
		Phillip		2500 Overloo...		Saint John	NB
		Janice		3999 Rainbo...		Terrebonne	QC
		Ronald		2500 Ov...		Saint John	NB
						Edmonton	AB
						Torrance	CA
						Beverly Hills	CA
						Ventura	CA
						Victoria	BC

Change Request Form:

Request Id: 1-71JFE | Requester Name: IN | Protocol: TRAIN | Site: 99

First Name: Ross | Last Name: Quigley

Mr/Mrs: [dropdown] | Degree: [dropdown]

PI Experience Since: [dropdown] | Sub-I Experience Since: [dropdown]

Employed By: [dropdown] | Research Availability: [dropdown]

Buttons: Address, Phone, Email

Add Address Modal:

Search: Office/Dept | 1 - 10 of 12+

Office/Dept.	Address Line 1	Address Line 2	Address Line 3	City	Prov/State
	Room 2149, 17...			Halifax	NS
	90 Glen Allan D...			Bridgewater	NS
	PO Box 2100, 4...			Saint John	NB
	Dept. de Pharm...			Terrebonne	QC
	PO Box 2100, U...			Saint John	NB
	16940 - 87 Ave...			Edmonton	AB
New Office Na...	Division of Car...	1124 W. Carso...		Torrance	CA
	414 N. Camden...			Beverly Hills	CA
	100 N Brent St.	Ste. 301		Ventura	CA
	1900 Richmon...			Victoria	BC

Contact Addresses:

Buttons: +, Update Address

Office/Dept	Address Type	Address Line 1	Address Line 2	Address Line 3	City
Madison Com...		1150 Reservoi...	Ste. 103		Cran...

Adding a NEW Contact or Account Record

- You can/should add **ALL associated values**, if possible, when you add a new Contact or Account record, including:
 - Email
 - Address
 - Phone/other numbers
- By doing this, you will not need to submit additional Global Data requests to add the related info

Pick Contacts ✕

+ 🔍 Affiliated Contacts All Contacts Last Name 1 - 10 of 11+

Last Name	First Name	Middle Name	Primary Email	Status	Sub-Status	Restriction	Address Line 1	Address Line 2	Address Line 3	City	Prov/State	Postal Code	Country	Primary Phone	Primary Fax
				Active	New										
Abel	Jane	S	jsabel@saintjo...	Active	Verified		Division of Car...	1124 W. Carso...		Torrance	CA	90502	USA	555-123-4568	919-111-1111
Abernathy	Victor		victora@train.c...	Active	Verified	Restricted I	10 Callaway Dri...			Durham	NC	28863	USA	919-555-1212	919-555-4321

Image of Pick Contacts window when adding a new Contact from the Site Contacts view tab

Adding or Updating Information for an *Existing* Contact

1. Go to the **Site Management** screen and locate your **Site**
2. Click the **Site Contact** *view* tab
3. Click the **blue hyperlink** name in the **Last Name** field for the Site Contact
4. On the **Contacts** *screen* tab click the **Change Request** button

Home Accounts Site Management Protocols

Sites Conversation Log 1

TRAIN Michelle Baker 99

More Info Acct Affiliations Site Contact Status History Milestones

Active Only

Role	Last Name	First Name
Legal Contact	Wonka	Willie
Pharmacy Contact	Quigley 3	Ross
IP Shipment Contact	Parrish	Robert

Contacts List

All Contacts 4

Change Request

Row Id	PersonId	Last Name	First Name
1-11J1C	1-11J1C	Quigley	Ross



On the Global Database screen tab, enter your edits

Change Request

Request Id: 1-71JEL Requester Name: INSTRUCTORDCRI Comments:

Protocol: TRAIN Site: 99

Submit Request
Cancel Request

First Name: Ross Last Name: Quigley Middle Name: Former Name:

Mr/Mrs: Degree: Population: Specialties:

PI Experience Since: Sub-I Experience Since: SC Experience Since: Clinical Background:

Employed By: Research Availability: Networks:

Address Phone Email

Contact Addresses

+ Update Address

Office/Dept	Address Type	Address Line 1	Address Line 2	Postal Code	Country	Location	Start Date
Madison Com...		1150 Reservoi...	Ste. 100	20	USA		7/3/2007

You can update *general* information here, like the Contact's Name, Degree, and Specialties

On the Global Database screen tab, enter your edits

Change Request

Request Id: 1-71JEL Requester Name: INSTRUCTORDCRI Comments:

Protocol: TRAIN Site: 99

Submit Request
Cancel Request

First Name: Ross Last Name: Former Name:

Mr/Mrs: Specialties:

PI Experience Since: Sub-I Experience: Clinical Background:

Employed By: Research A:

Address Phone Email

Contact Addresses

+ Update Address

Office/Dept	Address Type	Address Line 1	Address Line 2	Address Line 3	City	State/Prov	Postal Code	Country	Location	Start Date
Madison Com...		1150 Reservo...	Ste. 103		Cranston	RI	02920	USA		7/3/2007

On the Global Database screen tab, enter your edits

Home Accounts Site Management Protocols **Global Database** Reports Integration CAPAs

Change Request

Request Id: 1-71JEL Requester Name: INSTRUCTORDCRI Comments:
Protocol: TRAIN Site: 99 Submit Request Cancel Request

First Name: Ross Last Name: Former Name:
Mr/Mrs: Specialties:
PI Experience Since: Sub-I Experience: Clinical Background:
Employed By: Research A:

Address **Phone** Email

Contact Phones

+ Update Phone

Type	Phone	Extension:	Manual Dialing 1	Location	Start Date	End Date
Pager	555-555-2238				7/3/2007 12:00:00 AM	
Phone	555-555-9998				7/3/2007 12:00:00 AM	

Click the **Phone** tab to add or update numbers associated with the Contact

On the Global Database screen tab, enter your edits

The screenshot shows the 'Global Database' interface with the 'Change Request' form. The 'Email' tab is selected. A yellow callout box with a red border contains the text: "Click the **Email** tab to add or update email addresses associated with the Contact".

Change Request

Request Id: 1-71JEL Requester Name: INSTRUCTORDCRI Comments:

Protocol: TRAIN Site: 99

Submit Request
Cancel Request

First Name: Ross Last Name: Former Name:

Mr/Mrs: Specialties:

PI Experience Since: Sub-I Experience: Clinical Background:

Employed By: Research A:

Address Phone **Email**

Contact Email Addresses

+ Update Email

Email	Location	Start Date	End Date
quigley@train....		7/3/2007	

Enter multiple edits in one Request

Change Request

Request Id: 1-71JEL Requester Name: INSTRUCTORDCRI Comments: Submit Request
Protocol: TRAIN Site: 99 Cancel Request

First Name: Ross Last Name: Quigley Middle Name: Former Name:
Mr/Mrs: Degree: Population: Specialties:
PI Experience Since: Sub-I Experience Since:
Employed By: Research Availability:

Address Phone Email

Contact Addresses

+ Update Address

Office/Dept	Address Type	Address Line 1	Address Line 2	Address Line 3	City	State/Prov	Postal Code	Country	Location	Start Date
Madison Com...		1150 Reservoir...	Ste. 103		Cranston	RI	02920	USA		7/3/2007

Enter **Comments**, if needed, to further explain any of your edits, and then click **Submit Request**.

To exit without submitting your request, click **Cancel Request**.

You can enter general edits and edits on the Address, Phone, and Email tabs in ONE Global Database Request

Adding or Updating Account Information

1. Go to the **Site Management** screen tab
2. Locate the **Site** with the **Account** you need to update, *but don't drill into the Site record!*
3. Click the **Account** name **blue hyperlink** (*the link only appears in a list view*)
4. On the **Accounts** screen tab click **Change Request**

The screenshot shows the Site Management interface. The 'Site Management' tab is selected, indicated by a red circle with the number 1. Below the navigation bar, there is a search filter for 'My Sites' with the value '99' entered, also circled in red with the number 2. A table of sites is displayed with columns: Site #, Protocol, Project #, Region, Status, Sub-Status, PI Last Name, PI First Name, and Account. The 'Account' column for the first row, 'CA.R.I. Clinical Trials Inc.', is circled in red with the number 3.

Site #	Protocol	Project #	Region	Status	Sub-Status	PI Last Name	PI First Name	Account
99	TRAIN	9999	USA - Central	Interested Stop	DCRI decided n...	Baker	Michelle	CA.R.I. Clinical Trials Inc.
9912	TRAIN	9999	USA - South	Interested Stop	Contract issues	Ballard-Smith	Kristen	Cleveland Memorial Clinic
999	TRAIN	9999	USA - South	Active Stop	Other - see stat...	Atkinson	William	Gator Memorial Hospital

The screenshot shows the Accounts screen. The 'Accounts' tab is selected. Below the navigation bar, there is a dropdown menu for 'All Accounts'. A green 'Change Request' button is circled in red with the number 4. Below the button, there is a table of accounts with columns: Account Name, Account Type, and Account ID. The first row is 'CA.R.I. Clinical Trials Inc.' with 'Vendor' as the account type and 'No' as the account ID.

Account Name	Account Type	Account ID
CA.R.I. Clinical Trials Inc.	Vendor	No

Tips for Data Integrity



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- Use the **Search** tool at the top of any list to search in multiple ways (by location, by PI assigned, by email address, etc.)
- When adding a *new* Contact
- When adding new details to an *existing* Contact

The screenshot illustrates the CTMS interface with three red arrows highlighting key search and update features:

- Arrow 1:** Points to the search dropdown menu in the 'Active Only' list, which includes options like 'Last Name', 'First Name', 'Office/Dept.', and 'Address Line 1'.
- Arrow 2:** Points to the search icon in the 'Add Address' modal window.
- Arrow 3:** Points to the 'Update Address' button in the 'Contact Addresses' section.

Active Only List:

Last Name	Role	First Name	Office/Dept.	Address Line 1	Address Line 2	Address Line 3	City	Prov/State
Gibson	Study Coordinator	Ross	Madison Co...	1150 Reserv...	Ste...		Halifax	NS
		Robert	Saint Johns ...	1879 Madiso...			Bridgewater	NS
		Phillip		2500 Overloo...			Saint John	NB
		Janice		3999 Rainbo...			Terrebonne	QC
		Ronald		2500 Ov...			Saint John	NB
							Edmonton	AB
							Torrance	CA
							Beverly Hills	CA
							Ventura	CA
							Victoria	BC

Change Request Form:

Request Id: 1-71JFE | Requester Name: IN | Protocol: TRAIN | Site: 99

First Name: Ross | Last Name: Quigley

Mr/Mrs: [] | Degree: []

PI Experience Since: [] | Sub-I Experience Since: []

Employed By: [] | Research Availability: []

Buttons: Address, Phone, Email

Add Address Modal:

Office/Dept.	Address Line 1	Address Line 2	Address Line 3	City	Prov/State
	Room 2149, 17...			Halifax	NS
	90 Glen Allan D...			Bridgewater	NS
	PO Box 2100, 4...			Saint John	NB
	Dept. de Pharm...			Terrebonne	QC
	PO Box 2100, U...			Saint John	NB
	16940 - 87 Ave...			Edmonton	AB
New Office Na...	Division of Car...	1124 W. Carso...		Torrance	CA
	414 N. Camden...			Beverly Hills	CA
	100 N Brent St.	Ste. 301		Ventura	CA
	1900 Richmon...			Victoria	BC

Contact Addresses Table:

Office/Dept	Address Type	Address Line 1	Address Line 2	Address Line 3	City
Madison Com...		1150 Reservoi...	Ste. 103		Cran...

Be sure to update addresses *correctly*

- If adding a *new* address, click the **Add** button
- If *updating* an existing address, click the **Update** button
- Do not *update* an address in an attempt to add a *new* one – remember this affects other Contact and Site records, and could result in incorrect data

The screenshot shows a web interface for managing contact addresses. At the top, there are tabs for 'Address', 'Phone', and 'Email'. Below the tabs is the title 'Contact Addresses'. A red box highlights a green button labeled 'Update Address' next to a plus sign icon. Below this is a table with the following columns: Office/Dept, Address Type, Address Line 1, Address Line 2, Address Line 3, City, State/Prov, Postal Code, Country, Location, and Start Date. The table contains one row of data: Madison Com..., 1150 Reservoir..., Ste. 103, Cranston, RI, 02920, USA, and 7/3/2007. At the bottom right of the table, there are four navigation icons: a left arrow, an up arrow, a down arrow, and a right arrow.

Office/Dept	Address Type	Address Line 1	Address Line 2	Address Line 3	City	State/Prov	Postal Code	Country	Location	Start Date
Madison Com...		1150 Reservoir...	Ste. 103		Cranston	RI	02920	USA		7/3/2007



If you are copying/pasting info, be sure to *remove extra spaces* before and/or after entries

Change Request			
Request Id:	1-71JFE	Requester Name:	INSTRUCTORDCRI
Protocol:	TRAIN	Site:	99
<hr/>			
First Name:	Ross	Last Name:	Quigley
Mr/Mrs:	<input type="text"/>	Degree:	<input type="text"/>
PI Experience Since:	<input type="text"/>	Sub-I Experience Since:	<input type="text"/>
Employed By:	<input type="text"/>	Research Availability:	<input type="text"/>



Verify that a new email address is correct before submitting the Global Data request

Address Phone **Email**

Contact Email Addresses

+ Update Email

Email	Location	Start Date	End Date
quig123@train.edu		4/17/2024	
quigley@train.com		7/3/2007	

Do not enter the same person twice when adding a new element

- If you are adding a new address, phone number, etc., be sure to add it to the **existing** contact record, if one exists
- Remember, always search to find an existing contact before adding a new one
- To add new details (phone number, address, etc.) to an existing contact record, follow the steps at right

The screenshot illustrates a four-step process for finding an existing contact:

1. Select the 'Sites' tab in the top navigation bar.
2. Select the 'Site Contact' tab in the sub-navigation bar.
3. In the 'Active Only' section, click on the 'Last Name' column header.
4. In the 'Contacts List' dropdown, click on the 'Change Request' button.

Role	Last Name	First Name
Legal Contact	Wonka	Willie
Pharmacy Contact	Quigley	Ross
IP Shipment Contact	Parrish	Robert

Row Id	PersonId	Last Name	First Name
1-11J1C	1-11J1C	Quigley	Ross



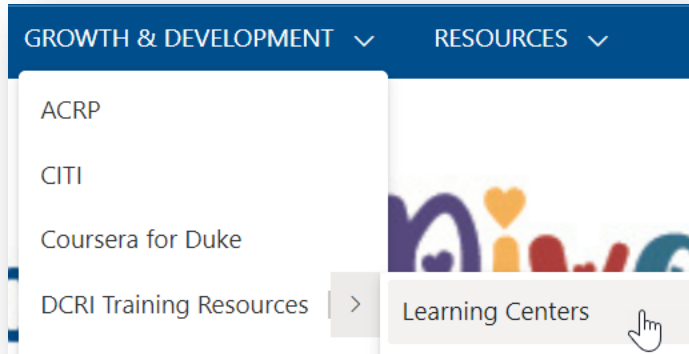
Resources



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CTMS Learning Center



- [Conference Room Technology](#)
- [Conferencing: WebEx](#)
- [Confluence Cloud](#)
- [Copiers](#)
- [Copilot in Bing_\(AI\)](#)
- [Coursera](#)
- [CTMS Learning Center](#)

Training Resources

[CTMS 5.0 Upgrade Bulletin](#) (PDF)

[Trip Report Letters_QRC](#) (PDF)

[Request for CTMS Form_QRC](#) (PDF)

[CTMS 4.1.1 Upgrade Bulletin](#) (PDF)

[CTMS 3.16.1 Upgrade Bulletin](#) (PDF)

[CTMS 3.15.1 Upgrade Bulletin](#) (PDF)

[CTMS 3.14.1 Upgrade Bulletin](#) (PDF)

[CTMS 3.12.1 Upgrade Bulletin](#) (PDF)

[Protocol Planning, Setup & Maintenance_URG](#) (PDF)

[Fundamentals User Reference Guide](#) (PDF)

[Site Management User Reference Guide](#) (PDF)

[Site Monitoring User Reference Guide](#) (PDF)

- From the Pulse home page, go to Growth & Development > DCRI Training Resources > Learning Centers
- <https://dcri.org/education-training/ctms-learning-center>
- **CTMS Site Management User Reference Guide (URG)**
 - *Requesting Changes to Global Contact & Account Information* (pages 63-67)



Questions?



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Thank You!



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