

Overview

CTMS Administrators maintain the contact and account information you associate with your sites. When you add new contacts or accounts, that new information is verified by the CTMS Administrators. To request changes to existing contact/account information (i.e., address, phone, or email data) or to add new data, you submit a Change Request. Because the data in the CTMS is shared across projects, the CTMS Administrators must verify your new entries and change requests to determine whether they will affect other projects. This protects the integrity of the data by minimizing inappropriate deletions or duplicate contact or account records.

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

Last Name	First Name	Office/Dept.	Address Line 1	Address Line 2	Address Line 3	City	Prov
Ross		Madison Co...	1150 Reserv...	Ste. 103		Cranston	RI
Robert		Saint Johns	1879 Madiso...			New York	NY
Phillip			2500 Overloo...			Madison	WI
Janice			3999 Rainbo...			Kansas City	KS
Ronald			2500 Overloo...			Madison	WI

Note: Searching for a contact by looking for their **Email Address** is a great option that can greatly reduce the need to merge duplicate records!

Adding a NEW Contact or Account record

You can and *should* add ALL associated values, if possible, when you *add* a new **Contact** or **Account** record, including:

- Email Address
- Address (City, State)
- Phone/other numbers

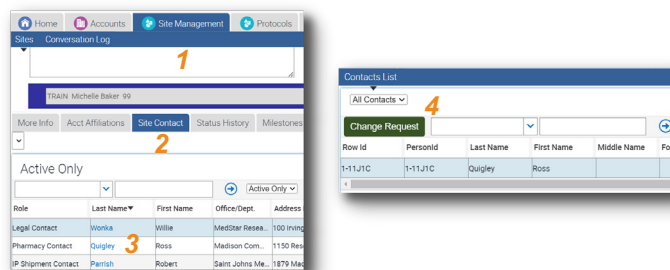
By doing this, you will not need to submit additional Global Data requests to add the related info

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
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

Note: Many mistakes have been made historically when a CTMS user adds a new Contact record *without* all the details, and then goes back to submit *multiple* separate Global Data Requests to individually add each element, like Email Address, Phone, etc.

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



On the Global Database screen tab, enter your edits

Click the Address tab to add or update addresses associated with the Contact

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

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

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

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

Enter multiple edits in one Request

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

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**.

Adding or updating Account information

Account requests are similar to Contact requests, however, you access the Account's blue hyperlink in the **Site Management** list, not within the Site record.

- 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**

Tips for data integrity

- Always do a **thorough search before entering any new data!** Use the **Search** tool at the top of any list to search in *multiple* ways (by location, by PI assigned, by email address, etc.) - searching for a Contact by looking for their **email address** is a great option!
- **Choose the correct option (Add or Update)** when submitting a Global Data request - select **Add** when adding a new address, select **Update** when making a correction to an incorrect address. Remember, changes to an existing address could affect other Sites' Contact and/or Account records.
- When **copying-and-pasting** info, be sure to **remove extra spaces** before and/or after entries.
- **Verify new email address accuracy** before submitting the Global Data request.
- **Do not enter the same person twice when adding a new element!** Always search for an existing Contact first - if one exists, add/update information for that person by following steps for *Adding or Updating Information for an Existing Contact*.

Getting help

- If you have questions or comments about the content of this QRC, please email [Technology Training](mailto:dcrittrain@dm.duke.edu) [dcrittrain@dm.duke.edu].
- For step-by-step instructions when submitting a **Global Data Request**, visit the **CTMS Learning Center** (<https://dcri.org/education-training/ctms-learning-center>), and access the **CTMS Site Management User Reference Guide** (under **Training Resources**), pages 63-67 (*Requesting Changes to Global Contact & Account Information*).