

1. PURPOSE

1.1. To record site CTMS user and privileges

2. PRIVILEGES

2.1. Detailed privileges can be found under SOP 7 (Roles, Responsibilities, and Support Structures).

2.2. 'Documents' privilege not listed on SOP 7

A	Accounting Section Access	Gives user access to the Accounting tab and provides the below ability to: <ul style="list-style-type: none"> A. Run financial reports. B. Update financials and accounting notes when building a study. C. Process financials. (i.e., Create billable items, process payments received from Sponsor and process provider payables.)
B	Administration	Gives user access to the Administration area <ul style="list-style-type: none"> A. Add a new study, create study arms, build study visits. B. Edit site information. C. Run administrative reports. D. Manage tables E. Manage Entities. F. Edit/view study providers and advertisers. G. Add new calendar event. H. Add/ search subjects. I. Add study contact. J. Edit subject profile
C	Assessment Cost Financials	Allows user to view financial information.
D	Configuration	Allows users access to the CONFIGURATION tab.
E	CRC for Assigned Studies	Designates the user as a study coordinator.
F	Delete or Merge Subjects	Allows users the authority to delete or merge existing subject profiles. Special caution should be given to this privilege, as deletion of subject's medical histories is not to be taken lightly
G	Delete Studies	Allows users to delete all data associated with a study from the RealTime-CTMS database.
H	Documents: Admin	Allows user to access eDocs admin tab to manage site-level folders, documents, templates and document archives. To view reviewer badges and notifications for queries for studies the user is assigned to.

I	Documents: Basic	Allows user to view, edit, share and upload documents on studies they are assigned to and send them for electronic signature.
J	Documents: General Site Documents	Allows user to manage, view, share and upload General Site documents.
K	Documents: Manage Study Contact Login	Allows user the ability to issue monitor portals by setting usernames and passwords for reviewers. All of which is managed from the Study Contacts section under the General Info tab within the study.
L	Documents: Manage User Documents	Allows users access to the My Docs area of site staff to be able to manage documents without having full admin privileges to other areas.
M	Documents: View Contracts & Budgets	Allows user to view and manage documents under the Contracts and Budgets category at the study level.
N	Financial QC	Allows user to access to the QC Visits → Financial QC tab and to the Submit Financial QC button on a Visit Assessment page.
O	Import Subjects	Allows user to import subjects from Excel files.
P	Make Referrals	Allows user to add subjects to studies.
Q	Manage Subjects Data	Allows user to edit subject data.
R	Manage Tables	Allows user to access the Manage Tables tab.
S	Red Flags	Allows user to manage Red Flag comments for subjects.
T	User Management	Allows an administrator to add and edit user information, including passwords, and system privileges.
U	View Study Data (Read Only)	Allows user to view study subjects for assigned studies.

RealTime CTMS User Log

Site Name: _____

First Name	Last Name	Position	Email	CTMS Privileges	Lead Signature

*Please Ensure that All PI Information & Privileges Are Added