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Linking practice to progress

TIPS AND TOOLS FOR WORKING WITH THE CTSU

SWOG Group Meeting
Oishi Symposium

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Topics

- Maximizing the CTSU Website
- Rostering Tips
- Viewing Regulatory Information
- Data Quality Portal Reminders and Tips
- CTSU Dashboard
- CRISP Notifications
- General Resources

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Maximizing the CTSU Website

- The CTSU has a robust website that serves as the center point for many of the activities sites perform with respect to the conduct of NCI-funded clinical trials.
- These are some tips and tricks that apply across the website, as well as some that are more context-specific.
  - The goal is to help those using the website to become more *efficient* and *self-sufficient* and minimize the need to contact the CTSU Help Desk.

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My Account | CRISP | Welcome Jenny Rebecca Hopkins. Your password will expire in 94 days. Impersonate another user

Home | Protocols | Dashboard | Regulatory▾ | OPEN | Data Management▾ | Auditing & Monitoring▾ | RUMS▾ | Delegation Log▾ | Resources▾

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Things to Look For on the Website

- Click on [? Help] or [Help Topics ▾] on most pages/applications to find details on their use (i.e., user guide-type content).
- Use 🔵 buttons to display context-specific details.
- Use *More Commands* 🖻 or *Export to Excel* 🖼 buttons to export tables/grids for review and distribution.
- Use filters to focus your queries and reports.
- Use the Dashboard for information that is personalized to you and your site(s).
- Use CRISP to subscribe to email notifications.

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Page-Specific Help Content

- Help Topics [Help Topics ▾]
  - Home Page
  - Regulatory
  - Source Document Portal
  - RUMS
  - Delegation Log

- Other help content, incl. user guides or [? Help]
  - Dashboard
  - OPEN
  - Data Management, incl. DQP
  - CRISP

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Person Information (Including Your Own)

Click on the My Account button to access information about your account

Use the Person 🔵 button to view affiliation and registration data (all persons)

Do you receive the Bi-Monthly Broadcast?

Expiration dates and registration type

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Tips for Rostering in RUMS

- Review the Help Topics
  - Includes the rostering business rules and roles and access matrix (by organization)
- Use the browser filters to run reports
  - Export query output to Excel

More RUMS Tips

- Find someone's CTEP ID using the CTEP ID Search
  - Query on full or partial first and/or last name
  - City/State/Zip help to confirm
- Use the RUMS Tracking tab to view and respond to roster owner queries

Viewing Regulatory Information

- Use filters to focus your search
- See what is needed to obtain approval
- Click on i button to view the site-protocol PI and the status of protocol requirements

Data Quality Portal Reminders and Tips

- **DQP Access**
  - Anybody rostered to a site can view the DQP; those with Rave-related roles can link directly into Rave from the DQP ▣.
- **DQP Reports**
  - Aging Report Summaries
  - Delinquencies/Queries by Form
  - Rave Delinquencies/Queries
  - DQP Summary Table (*Rave Home*)
  - DQP Timeliness Reports (*Quarterly; Static*)
- **Exporting DQP reports**
  - Reports can be exported when the More Commands ▣ icon or the Excel icon ▣ is displayed.

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More DQP Reminders and Tips

- Remember that the DQP refreshes nightly.
- Drill down to the form/field level in Rave to find delinquent forms and outstanding queries that you can't see at the site, patient, or folder level.
- DQP User Guide
  - The DQP Site User Guide provides assistance for using the DQP and is accessible via the Help icon [? Help].
- Use CRISP to subscribe to bi-weekly notifications from the DQP (and SDP).

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Dashboard Reminders and Tips

- The CTSU Dashboard contains all available data specific to each person, their associated sites, and protocols of interest. The Dashboard can be customized to suit your needs and preferences.
- Available portlets:

Site Accrual Report	Protocol Accrual Summary
In-Progress Enrollments	Expiring IRB Approvals
Multi-Step Enrollments	CTEP Profile
Rave Study Access	CIRB Site Approvals
Site Registration	DTLs Awaiting CI Approval
Unviewed DSNs	CIRB Document Updates
Quick Links	Site Registration Summary
CTEP Status Notifications	Protocol Profile
Newly Posted Protocols	Outstanding Funding

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Dashboard, Cont.

- Many portlets contain information you can find elsewhere, but the dashboard allows you to see them in one place, *with your preferred filters in place.*
  - For example, you can view data only for the protocols your sites are registered for:

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Which Studies Use Which Applications?

- In the Dashboard (Protocol Profile Portlet)

- In an individual protocol page

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CRISP Notifications

- The CTSU Report and Information Subscription Portal (CRISP) allows staff to manage automated subscription e-mail notifications in a central location.
- Some automated emails are distributed to certain individuals based on their roster roles (e.g., Primary Contacts) or other activities (e.g., the individual who uploaded something in the SDP that was then rejected), but these and other notifications can also be subscribed to via CRISP.

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Available CRISP Notifications

More notifications are in development!

General Resources

- Resources area of the website
  - CTSU Operations Information is especially useful for those new to the CTSU
  - We are working to develop orientation/overview materials
- Remember the help content for individual pages and applications!
- CTSU Help Desk
  - CTSUContact@Westat.com
  - 1-888-823-5923

Questions?

The CTSU has a table at the ORP Open Forum this afternoon, where you can ask about this content or anything else.