

Title:	Instructions for Users of the CTRC Study Startup Dashboard	Origination Date:	12.1.24
Department:	CTRC, CCTSI		
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**CLINICAL AND TRANSLATIONAL RESEARCH CENTER (CTRC)
ADULT CTRC STUDY STARTUP DASHBOARD: USER MANUAL**

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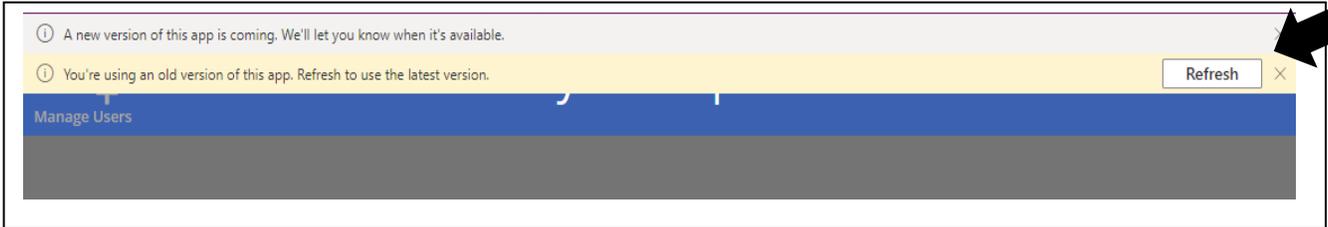
QUICK TIPS TO KEEP IN MIND WHEN UTILIZING THE STUDY STARTUP DASHBOARD

1. All studies are to be managed through the CTRC Study Startup Dashboard. Please review and utilize [this letter](#) for any studies with Startup prior to the Dashboard inception.
2. The study PI or CRC can add additional members to the dashboard as needed at any time.
3. You must click “submit and notify” with any status change to trigger notifications.
4. Selecting “Refresh” on each page will display the most recent changes.
5. A question mark in the right-hand corner will be directed to the [INFORM](#) ticketing system in the event of a system error, or generic questions.
6. All visit names must match both OnCore and Scheduler template names.
7. **Do not use “Open in Desktop” to work on MD Orders, the orders will not save back to the Dashboard and any changes made will not be reflected in the dashboard.**
8. For Industry studies requiring CTRC Core Lab, a lab manual must be uploaded.
9. If changes or a Core Lab build are required to only an Industry Lab manual, please email the [Core Lab](#) directly to update.
10. Status updates are only required by the study team in their respective drop-down list.
11. Only the lead CRC(s) assigned to the study will receive all study notifications and status changes via email.
12. When orders are submitted, a PI meeting request will trigger the CCTSI administrator to schedule.
13. **Orders will not be accepted for any changes/amendments without track changes or highlighting within the Word Document.**
 - a. **Previous versions of MD orders will not automatically populate into the study folder. A blank template will be preloaded.**
14. MD orders will be locked once submitted to Pharmacy to review, no edits can be made after this step.
15. For changes to the study PI submit an [INFORM](#) ticket to have the study folder updated.
16. It is advised that you check history regularly to ensure the notifications as well as if any comments have been added by any of the members.
17. Comments in history feature do not create notifications only the status changes do.

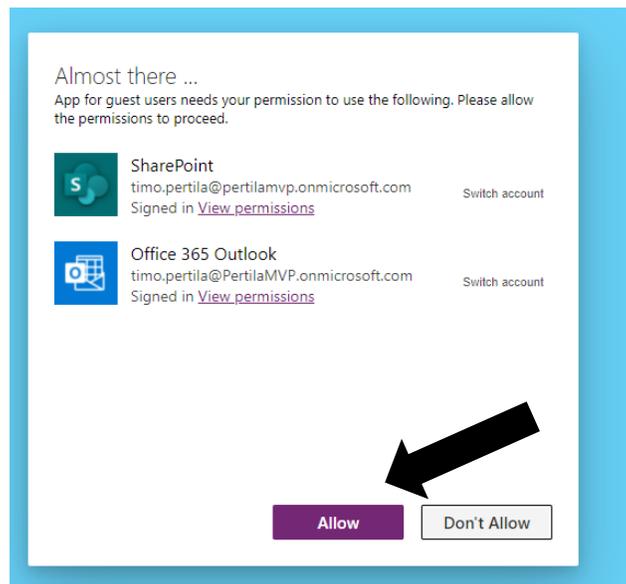
SECTION 1: HOW TO NAVIGATE THE DASHBOARD

1.1: Accessing the [Dashboard](#)

If you receive a notification when opening the Dashboard that an updated version of the application has been released, please be sure to select the refresh button at the upper right corner. This will always notify you when you are using an older version.

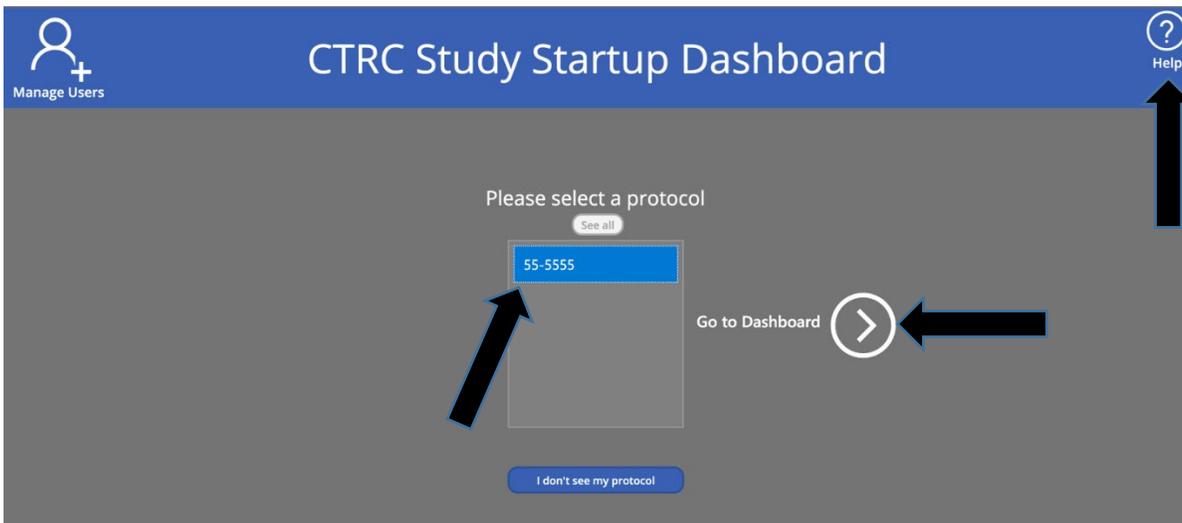


Additionally, you will need to "allow access" if ever requested within the dashboard.



1.2: CTRC Study Startup Dashboard Home Screen

1.2.1: The home screen page displays access to all user-associated studies, user management, global view, and INFORM ticketing. These will all be described in detail in the following sections.



1.3: Opening study folder: select the COMIRB number and select the “Go to Dashboard” arrow (above)

1.3.1 If your study is not listed, select the “I don’t see my protocol” button. If your study does not populate, notify your study team to add you as a member or submit an [INFORM](#) ticket

1.4 CTRC MD Orders Page

1.4.1 This page displays all status updates for each core related to the “MD Orders”. Status updates may include the need for the study team to update the MD order documents, provide lab manuals, or update lab needs, among others. Studies that do not require MD orders do not need to view this ‘orders’ tab as it will not be relevant to study startup.



1.5 Viewing History and Comments

1.5.1 There are two locations to review all study history of status updates, and any comments required for changes to documents.

Home
 Refresh
 Global View
 Information and Examples
CTRC MD Orders
 IRB: 00-0000
 Submit and notify
 Help

Order
 Study Team
 CTCR Nursing
 Core Lab
 CURP Pharmacy
 UCH Pharmacy
 Complete

Build and Review Orders
 View History

Back
 Refresh
 Study Info
 Open
Document View
 Add new visit
 Help

Build and Review Orders for 77-7777

Orders.docx Open Delete

2/26/2026 2:32 PM

Please go back to the main study page to submit status changes and notify.

DocuSign started by

History for Build and Review Orders

kyla.wulff@uchealth.org added comment on 2/26/2026 2:33 PM: Visit history will populate here. Comments will populate here.

The comments made here do not send a notification. To trigger notifications, use the status change drop down feature above. For more specific order needs, place an additional comment within the word document as well.

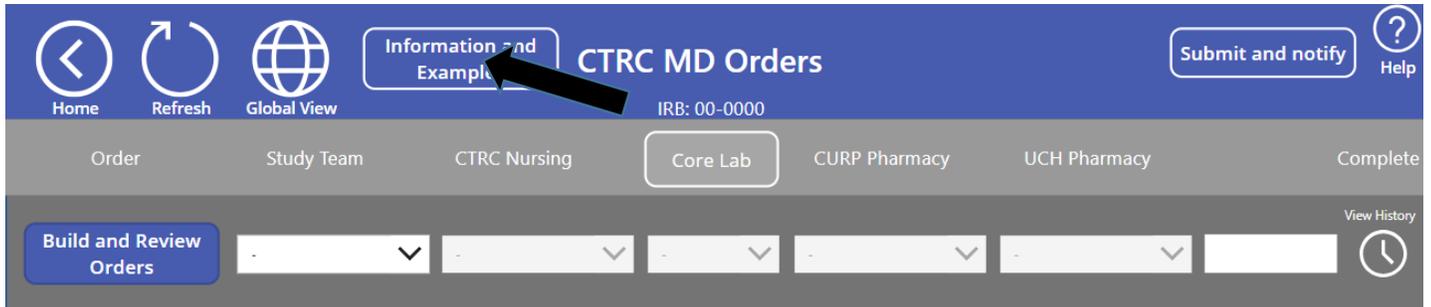
Ok

If your comment pertains to a specific visit, please be sure to notate the visit within your comment

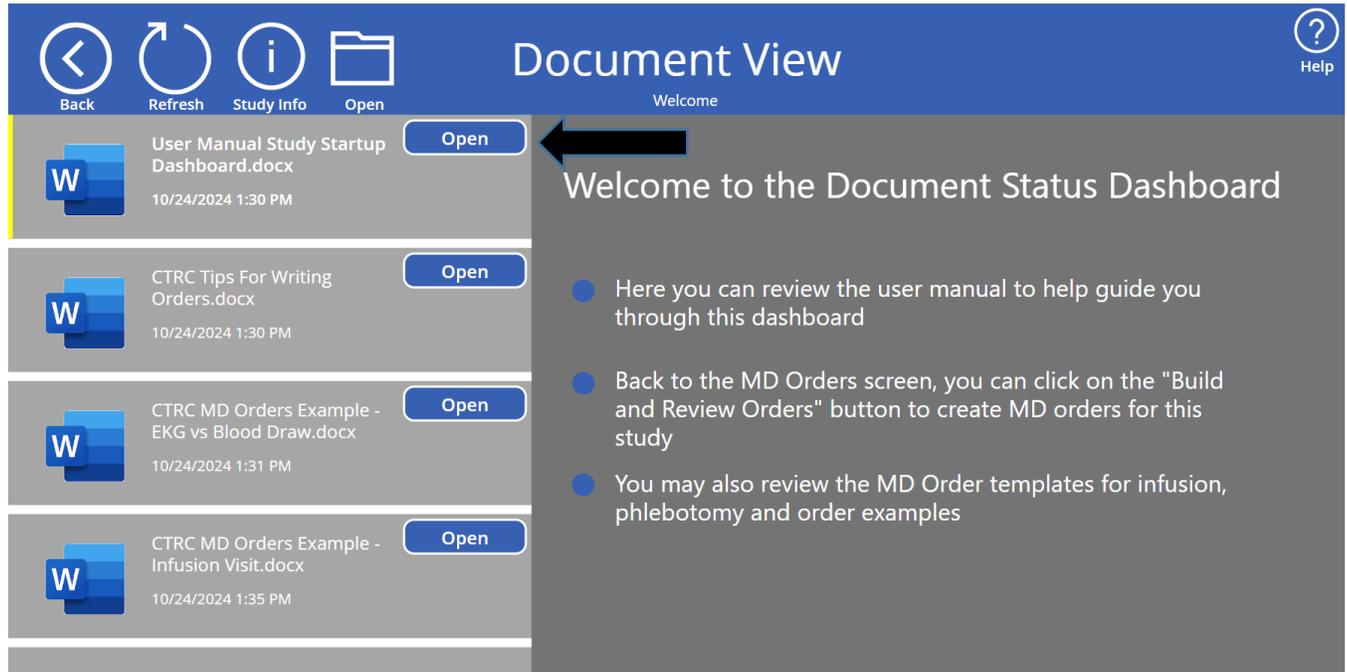
Submit Comment

SECTION 2: BUILDING MD ORDERS

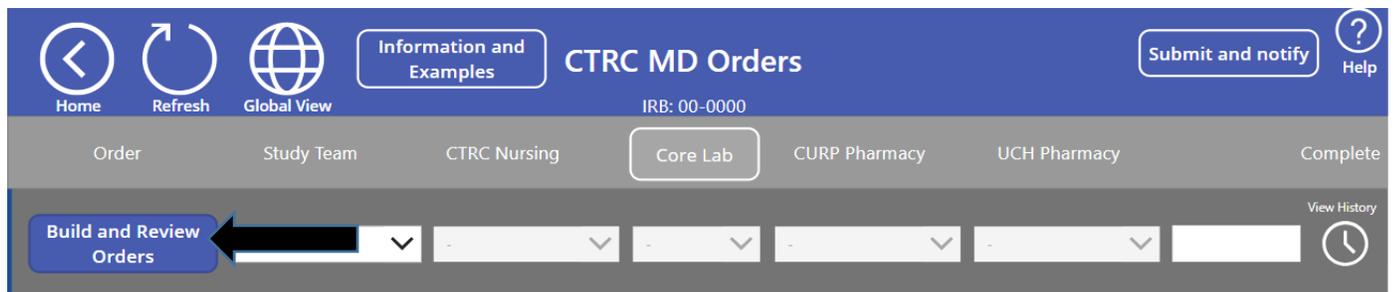
2.1: Select the “Information and Examples” Folder



2.1.2: This folder includes example templates and this manual for reference. Select “Open” to view each document. Close out of the window to return to the Dashboard. Select “Back” when review of these documents is complete.

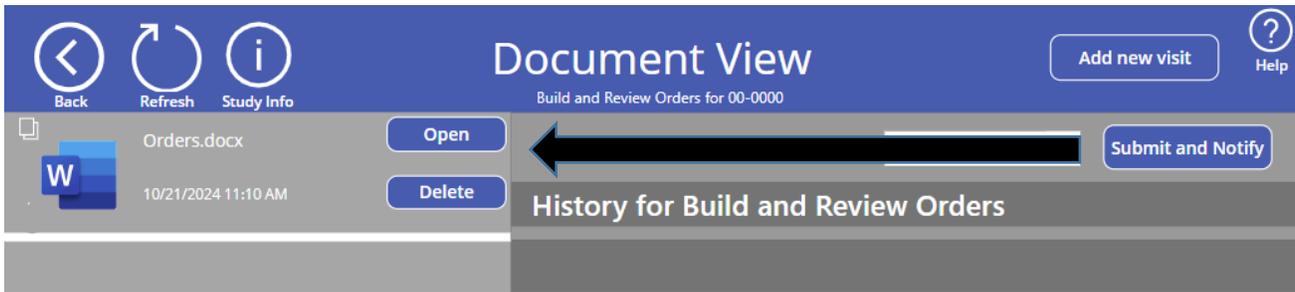


2.2 Select the “Build and Review Orders” button to open, view, and edit MD orders.



2.3: Building the MD orders in Word

2.3.1 The first visit will be called "Orders". Select "Open"



2.3.2: Build MD orders visit utilizing in-text comments inserted on the right

UNIVERSITY OF COLORADO HOSPITAL CTRC MD ORDERS
AURORA, COLORADO

1) **Admit** to CTRC for Protocol # **Visit #**

Title:

Location(select all that apply): Inpatient Outpatient

2) **Notify:** Study Coordinator of patient arrival to the unit.
PI: _____ Provider on Study: _____ CRC: _____
Cell #: _____ Cell #: _____

3) **Obtain: Vital Signs (VS) Height, Weight:** No shoes, empty pockets, no heavy coat/jacket

4) **Verify Allergies**

5) **Verify Documents**
Consent Auth B, H&P, Central Venous Line access/flushing protocol.

6) **STAT orders/Special Considerations:** See Invite (or N/A)

7) **Visit Parameters:**
Call MD for BP >180/100, <90/50, HR>110 <40, RR>20, <6, Glucose >250 <50 (Standard CTRC call orders)

8) **Diet:**

9) **Activity:**

10) **Stop Criteria:** Per Coordinator discretion. Notify as needed

11) **Medication Orders:** UCHealth IP Research Pharmacy or CU Anschutz OP Research Pharmacy (select one)
Predose:
Study Drug:
PRN Meds:
Special Medication Administration Instructions:
(ex. Special tubing, handling, or addition of an in-line filter)

12) **Procedures for Protocol**
A) **Venous Access:**

BD Branham, Diane ...
For ALL sections, 1-14, only complete items that pertain to your protocol. If a section does not apply, please type [See more](#)
@mention or reply

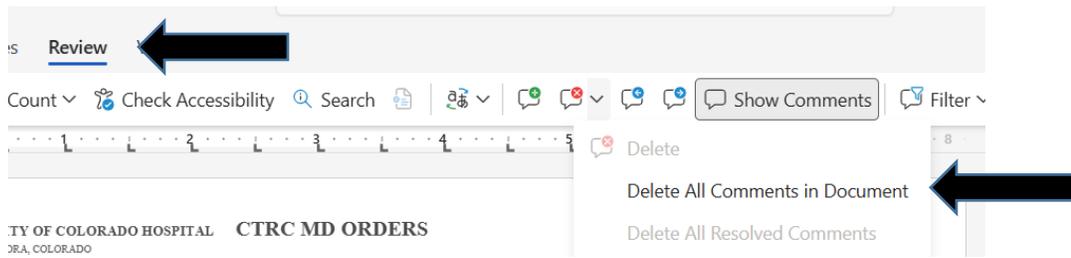
BD Branham, Diane ...
Each unique visit should have their own set of orders
@mention or reply

BD Branham, Diane ...
What VS readings do we need, how often, and who is taking them (CTRC staff vs. study staff). Delete any that [See more](#)
@mention or reply

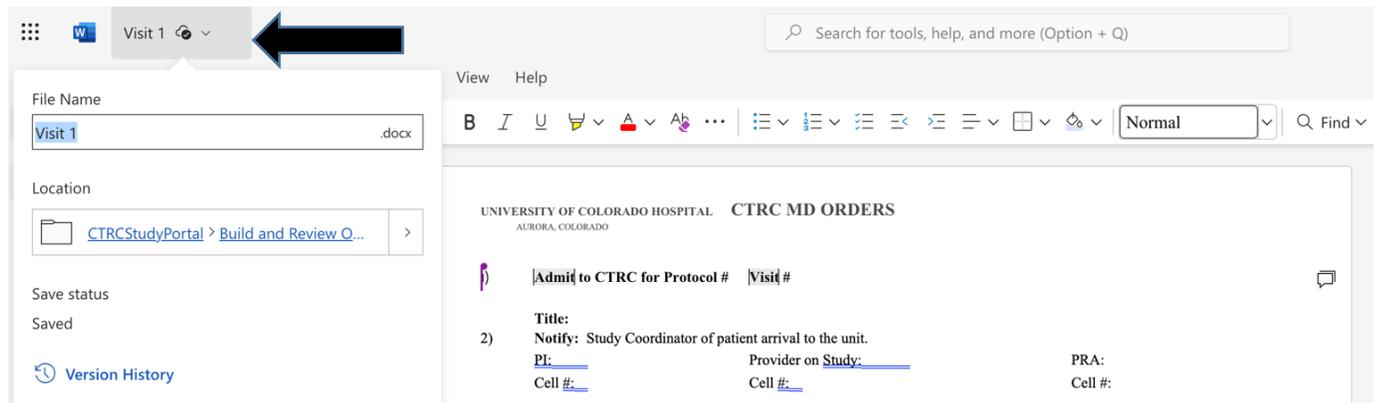
BD Branham, Diane ...
Please leave these-we do this for every participant.
@mention or reply

BD Branham, Diane ...
Often N/A but please specify things like "room with full bed", "negative flow room only", "room that can [See more](#)
@mention or reply

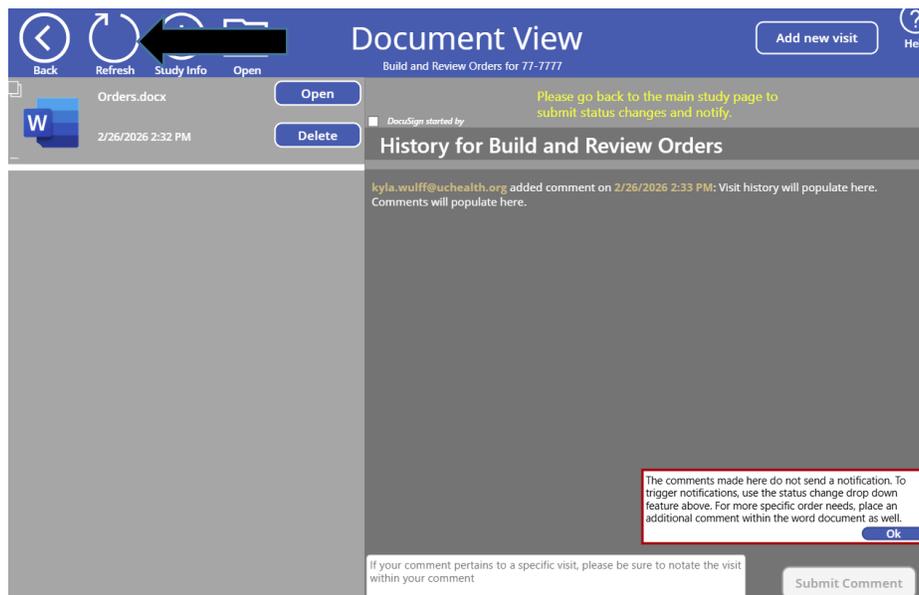
2.3.3: When complete, **delete all pre-loaded comments** from Diane and Kyla. This can be done by going to “Review” on the toolbar, then to delete comments drop down and selecting ‘Delete All Comments in Document’.



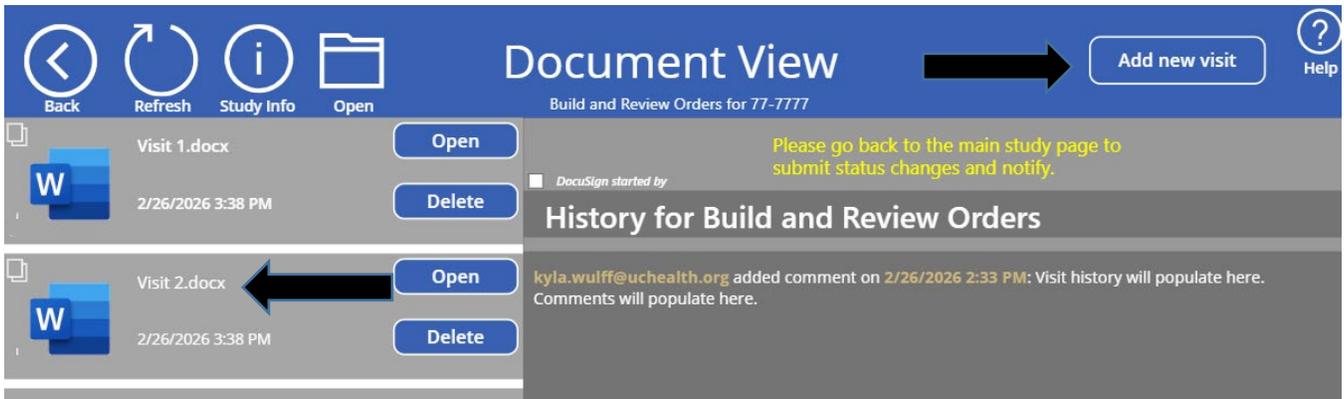
Then rename the visit by selecting the “orders” name in the upper left corner of the document. The visit name must match exactly the naming used in OnCore and Scheduler. This will display a checkmark within the cloud when saved. You may now exit the document.



2.3.4: Return to the folder, and select refresh to display the updated visit name



2.3.5: Select “Add New Visit” to create additional visit orders with a blank template



2.3.6: Select the copy icon within the Visit box if an exact copy of that visit is desired. This new document can be renamed the same as the above in [Step 2.3.3](#). To create multiple copies: rename each copy before selecting the copy function again on the same order.



2.3.6: Select the “delete button” to delete the visit if needed

NOTE: All visit names must match both OnCore and Scheduler template names.

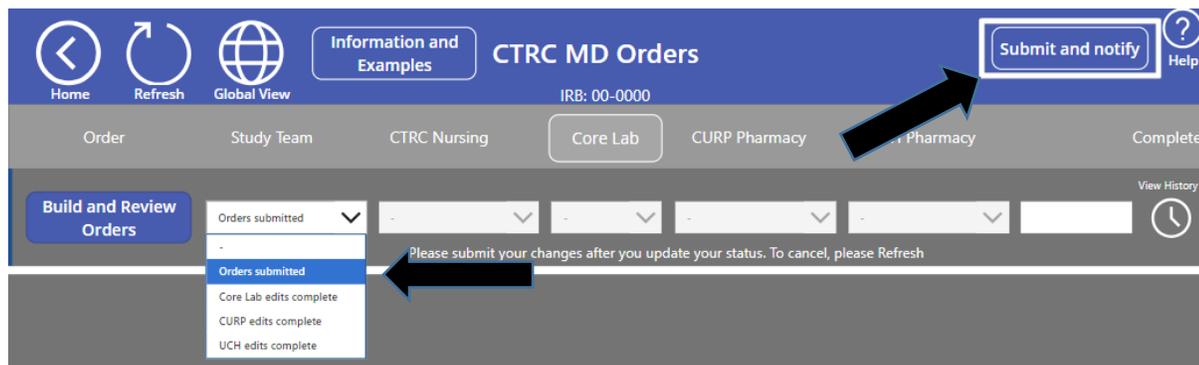


2.3.7 Once MD orders are completed, select the back button in the document view screen.

SECTION 3: STATUS CHANGES AND COMMENTS

3.1 Status Changes

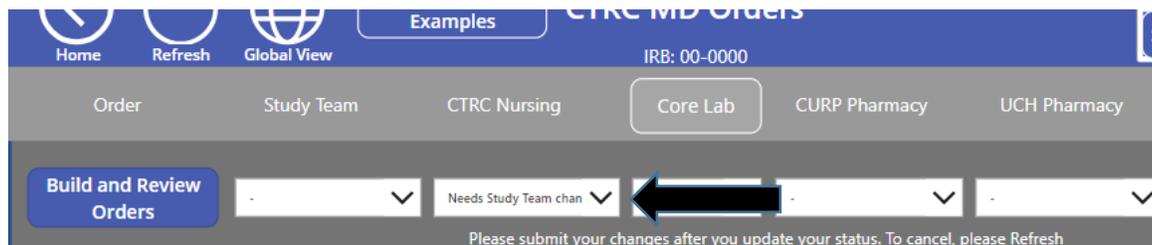
3.1.1 When ready to submit the orders for CTRC Nursing review select the status drop down listed under “Study Team” in CTRC MD Orders Screen



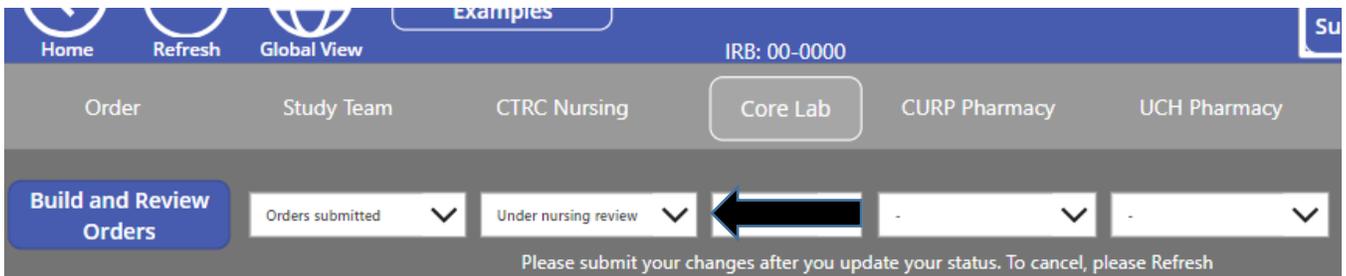
3.1.2 Select the “orders submitted” status, **then select “submit and notify”** in the right-hand corner. This will notify the CTRC nursing core that MD orders have been submitted.

3.1.2b Upon initial order submission an automatic notification will be sent to CTRC Research Administrator to set up a PI meeting.

3.1.3 CTRC nursing will be notified and review the orders. Then, select the appropriate next status step. If the orders require additional information from the study team, the CTRC Nurse Liaison will select “Needs study team changes” creating an email notification to the lead CRC(s) listed within the dashboard. This will reset the status drop down under study team to “-” (null). Review comments for necessary changes both within the document and within the history and comments field for information needed. The study team is responsible for making all necessary changes to the document (1.6). Follow step 3.1 to submit.

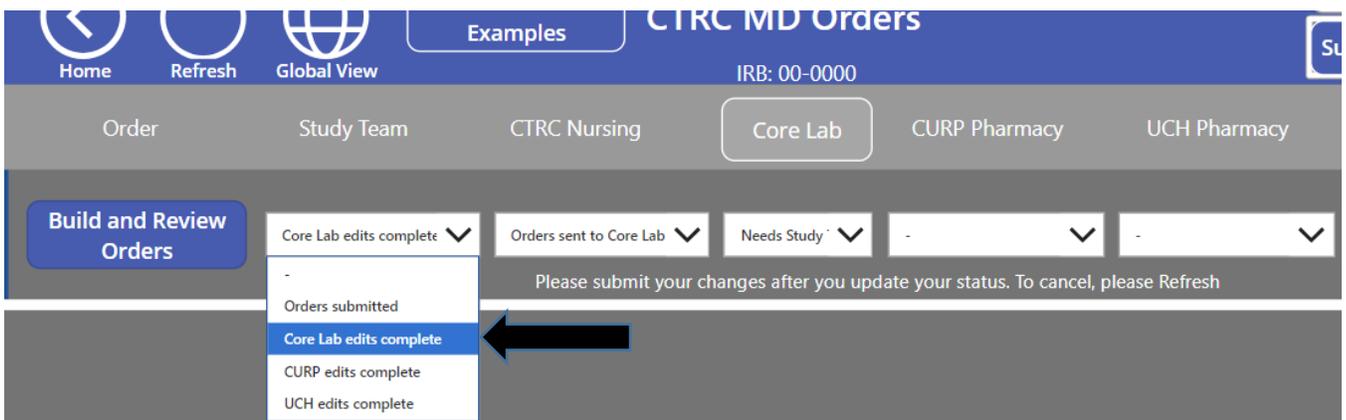


3.1.4 While orders are under nursing review, the status under nursing will display as “Under Nursing Review”.

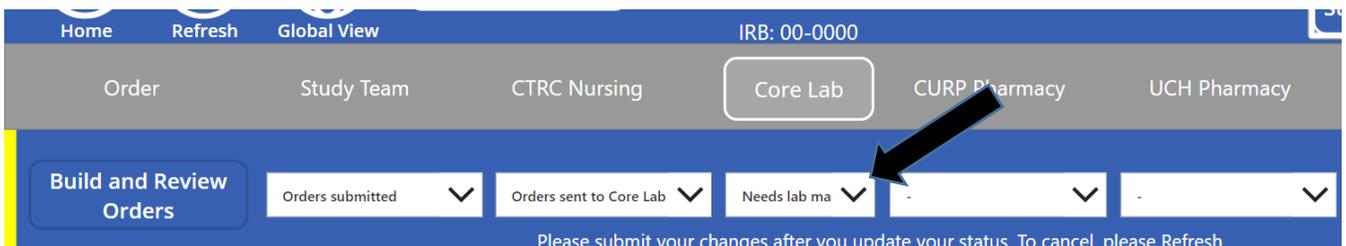


3.2 Core Lab Review and Manual submission (if applicable)

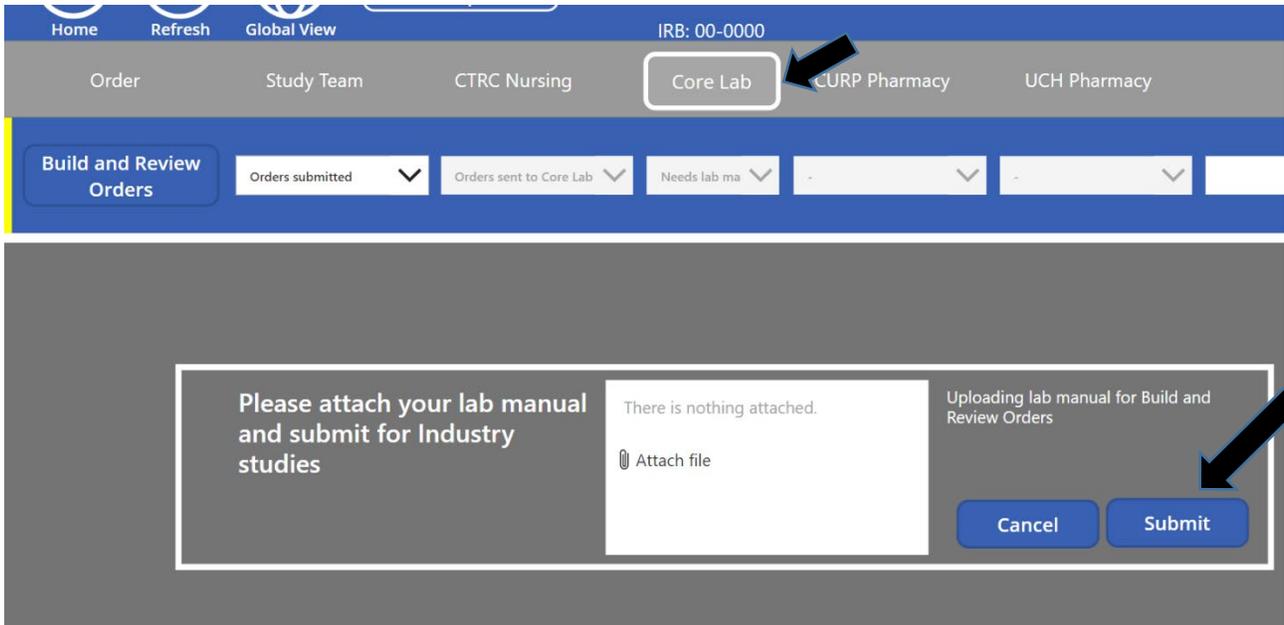
3.2.1 Core lab will complete MD orders review simultaneously with CTCR Nursing and select “Needs Study Team Changes” if additional information or changes are needed to the lab section of the orders. This will create an email to be sent to the lead CRC(s) listed in the dashboard. When edits have been completed by the study team, select “Core Lab edits complete” to notify the CTCR Core Lab of finalized edits.



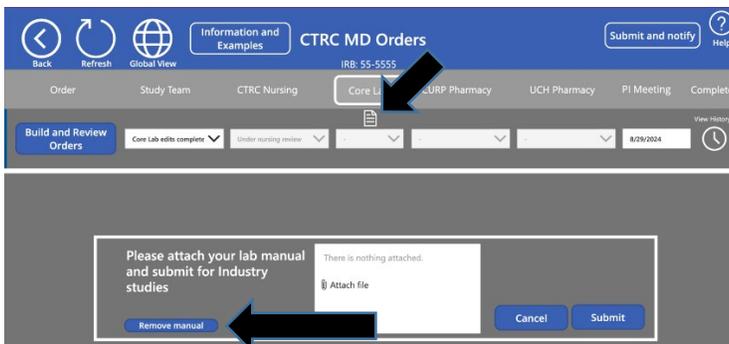
3.2.2 If a lab manual is requested, the Core lab will select “needs lab manual”. This will create an email to the lead CRC(s) listed on the study.



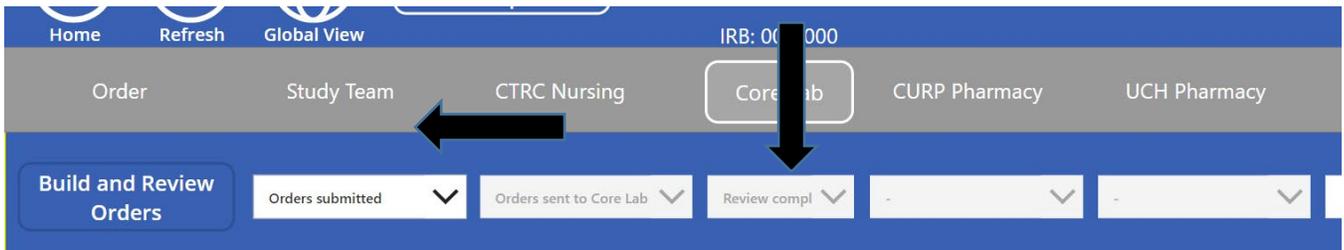
3.2.2a To submit a lab manual select the “Core Lab” heading above the status drop down and attach the appropriate document(s). Attach the file and select “submit” within attachment window. Once the manual is uploaded, the CTCR Core Lab will receive an email notification of its completion automatically. **No status change is required for a lab manual upload.**



3.2.2b The attached manual is now viewable as the page icon above the Core Lab status drop down. The manual can be removed and updated at any time by selecting the Core Lab heading and selecting Remove manual and resubmit the new manual as described above.

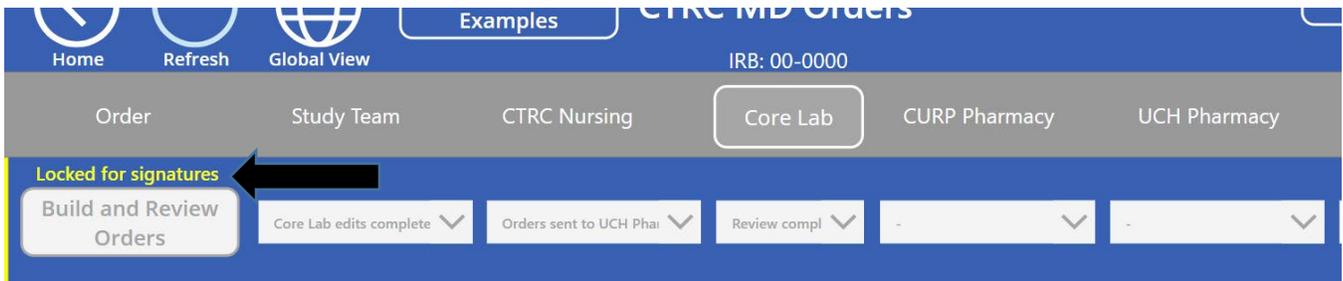


3.2.3 When Core lab review is complete the status will be updated to "Review Complete" by the Core Lab. CTCR Nursing and the Lead CRC will be notified automatically.

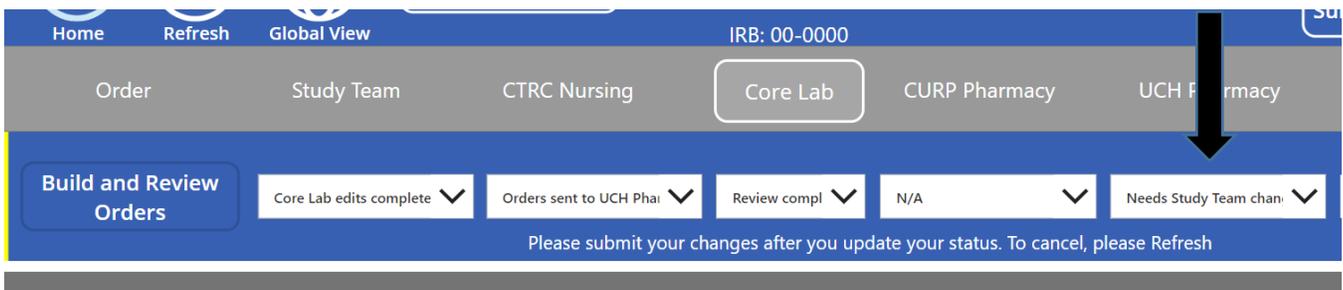


3.3 Pharmacy Review and sign-off (CU Research Pharmacy or UCHealth IDS Pharmacy)

3.3.1 CTRC nursing will create a status change for the Pharmacy review with the designated pharmacy. When documents are submitted to the pharmacy for review, documents will be locked (greyed out) for editing until pharmacy review is completed.

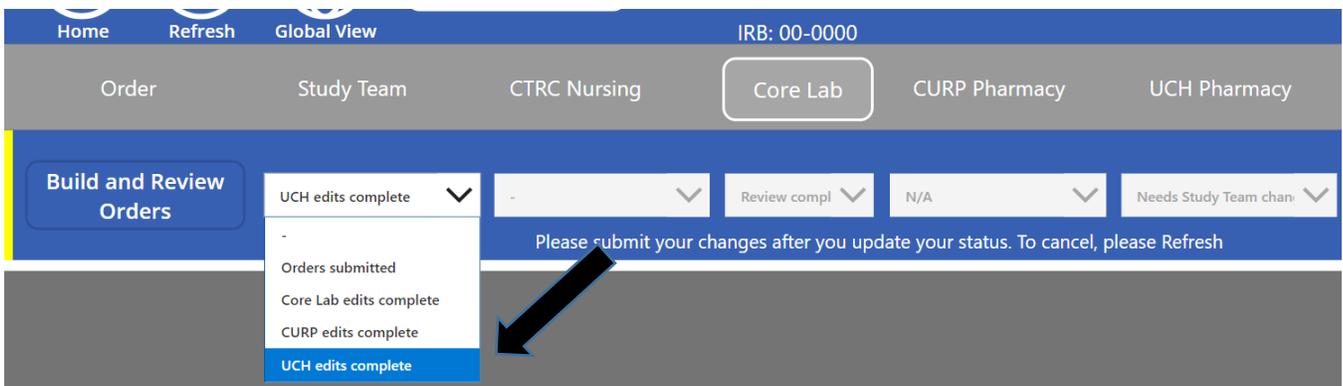


3.3.1a If additional edits are required, pharmacy will select "Needs Study Team Changes". This will create an email notification to the lead CRC(s) on the study.

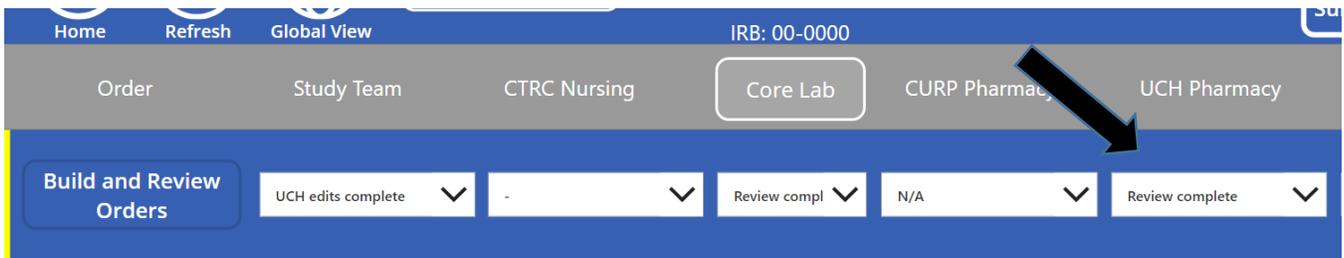


3.3.2 If the orders require additional information from the study team for Pharmacy use, review comments for necessary changes both within the document and within the history and comments field for information needed and make the appropriate changes, see section (1.6).

3.3.3 Once edits are finalized, select "Pharmacy edits complete" under the study team drop down for the **appropriate Pharmacy** to notify the pharmacy of finalized edits.

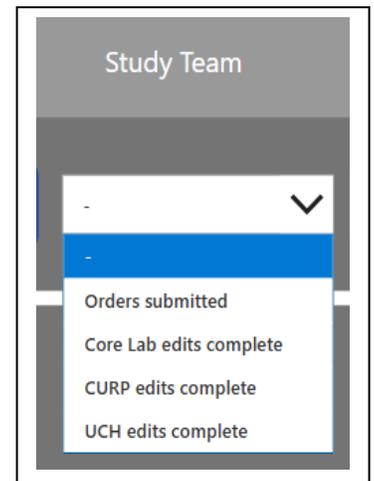


3.3.4 When the Pharmacy review is complete, the pharmacy status will display as “Review Complete” and will automatically notify CTRC Nursing and the Lead CRC



Note: If Pharmacy review is not required for the documents, CTRC nursing will manage completion of orders.

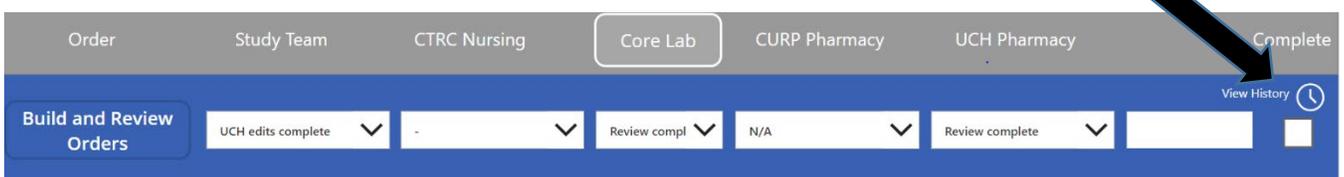
3.3.4.1 You must go to null or “-” status if you need to trigger notification while keeping the status the same. So if current status is ‘orders submitted’ and you wish to trigger a notification then go to “-” **then back to “orders submitted” and click submit and notify.** This will send the email notification. Without changing to null will not notify the needed team and hence this step is important.



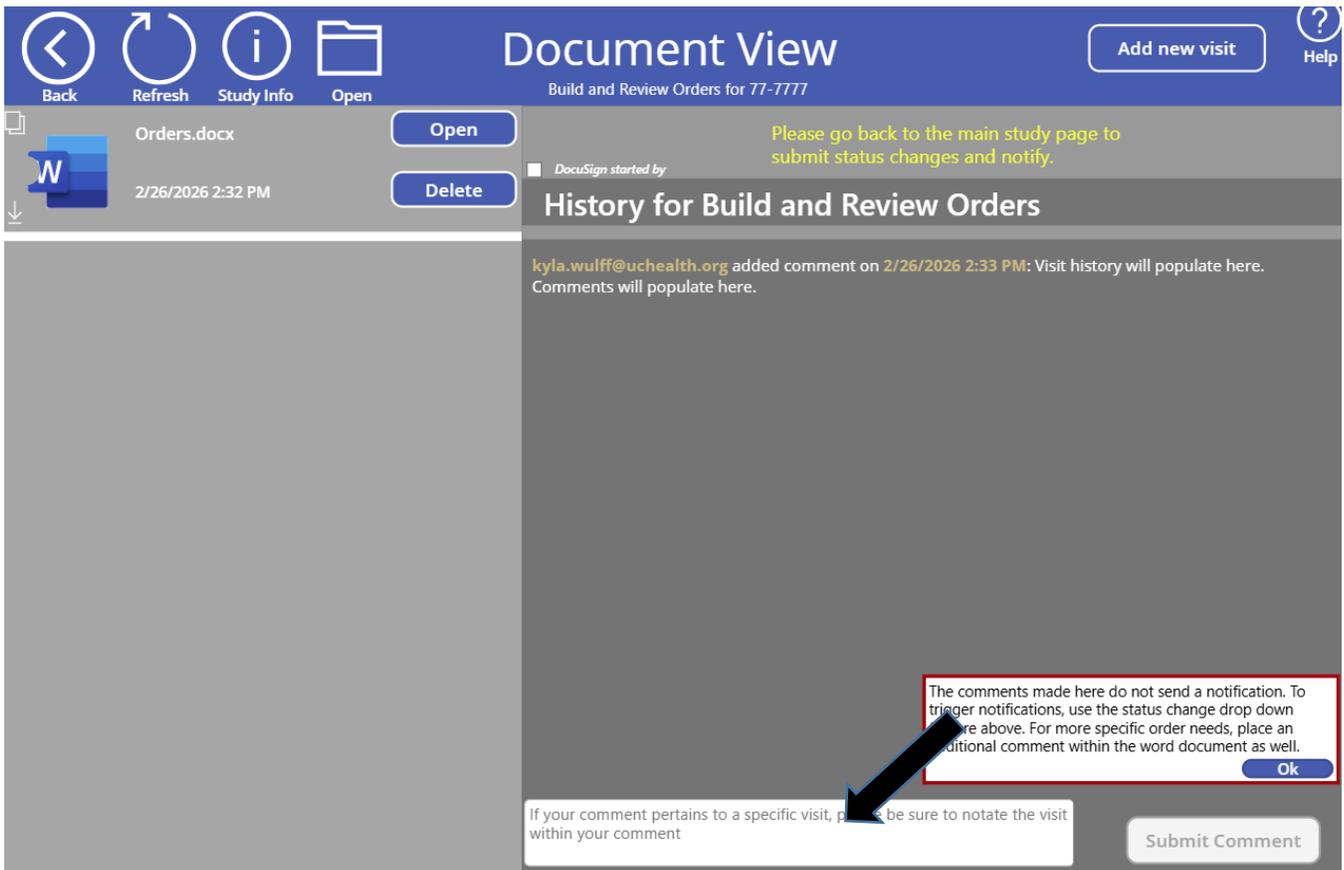
3.4 Upon completion of Pharmacy review (if required), CTRC nursing will notify CTRC Leadership to create a docusign for all study MD documents. The study MD will sign along with pharmacy, nursing leadership, and upon completion, the lead CRC and the study MD will receive a signed PDF copy from DocuSign. The email will arrive from DocuSign with the study COMIRB in the title. This can be utilized to build any future MD order changes or amendments by referencing and placing into the new order document. See [Section 5](#).

3.5 Comments and History(review)

3.5.1 Comments and History can be viewed by selecting the “View History Clock” on the right side of the screen (above). Comments are displayed chronologically from the top and include both status updates and comments. If a comment is specific to a visit, please include the visit name and all details. **Comments do not trigger a notification; they must accompany a status drop down change.**



3.5.1a Comments can also be viewed from the Document View Page.



3.5.2 Comments can be made by selecting within the white box in this screen and clicking "Submit comment".

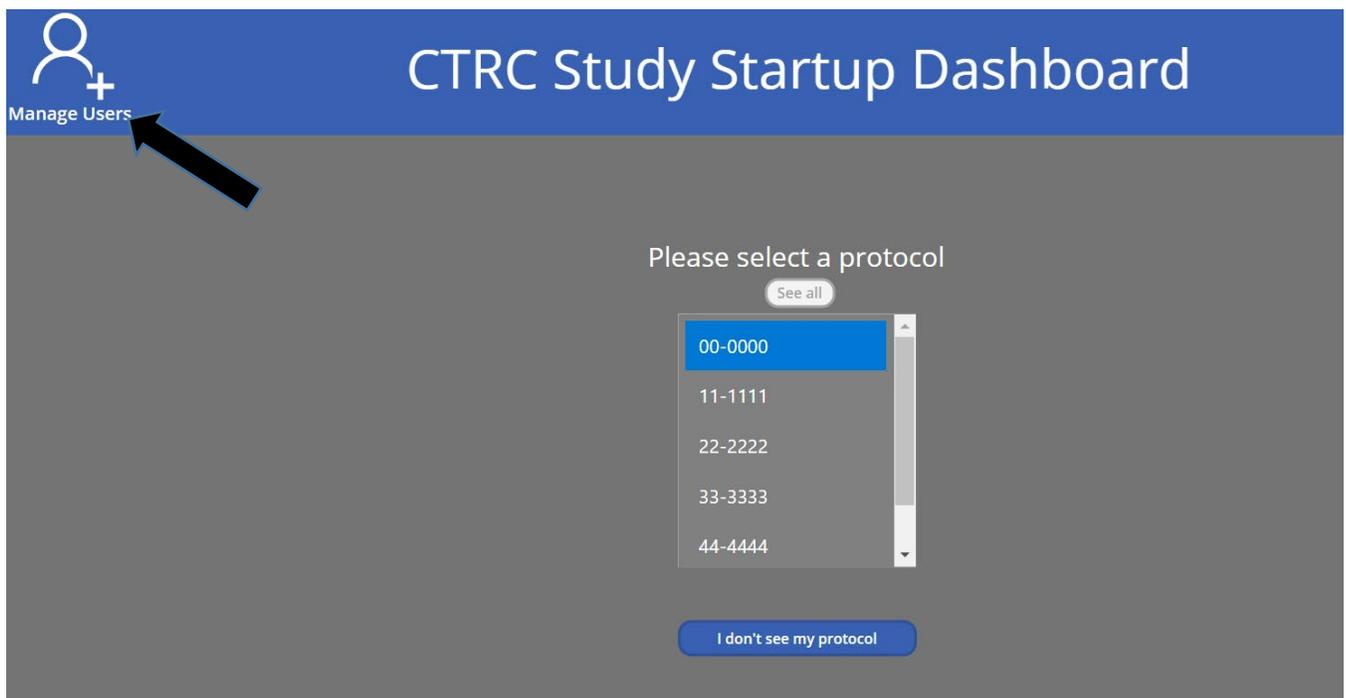
NOTE: Comments do not create notifications. Please ensure comments are thorough and specific. They must be associated with a status change.

IMPORTANT: Email notification when complete gets posted in the history tab. You must review 'view history' tab regularly to ensure that email notifications went through and also if any comments were added by any members.

SECTION 4: HOW TO ADD/EDIT TEAM MEMBERS

The CTRC Welcome Letter will be emailed to the PI and lead contacts listed in the Protocol Assessment Form and will include a link to the study folder on this dashboard. The study team can follow the steps below to designate the right team member as the lead Clinical Research Coordinator as needed. The study team can also add team members to view the study documents using the steps below. **The Lead CRC(s) assigned to the study will receive all study notifications and status changes via email.**

4.1 To make changes and updates to the study team, first, select the study COMIRB, then select the “Manage Users” Button on the main page in the left-hand corner.



4.1.1 To add a team member, select your COMIRB number in the left column, then select “new team member”. Type in the email address (ensure accuracy) and select “Submit New”.

Protocols	Team Members	Member Status
00-0000	teststudy@cuanschut.edu	<p>Please select a team member email if no item is displayed</p> <p>Team member email address</p> <input type="text"/>
11-1111	kyla.wulff@uhealth.org	<p>Protocol Number</p> <input type="text" value="00-0000"/>
22-2222		<p>Name of Principle Investigator</p> <input type="text" value="Test1"/>
33-3333		<p>Principle Investigator email address</p> <input type="text" value="teststudy@cuanschut.edu"/>
44-4444		<p>Team member is the Lead CRC <input type="checkbox"/></p>
55-5555		

4.1.2 To remove a team member, select your COMIRB number in the left column, then select “Edit Team Member”, select the team member name, and finally select “Remove” near their email address.

The screenshot displays a web interface with three main sections: Protocols, Team Members, and Member Status.

- Protocols:** A list of COMIRB numbers: 00-0000, 11-1111, 22-2222, 33-3333, 44-4444, and 55-5555. The 00-0000 entry is highlighted in blue.
- Team Members:** A table with two columns. The first column contains the COMIRB numbers. The second column contains team member email addresses: teststudy@cuanschut.edu and kyla.wulff@uchealth.org. The first row is highlighted in blue.
- Member Status:** A form titled "Member Status" with the instruction "Please select a team member email if no item is displayed". It includes:
 - A dropdown menu labeled "Team member email address" with "teststudy@cuanschut.edu" selected.
 - A text input field for "Protocol Number" containing "00-0000".
 - A text input field for "Name of Principle Investigator" containing "Test1".
 - A text input field for "Principle Investigator email address" containing "teststudy@cuanschut.edu".
 - A checkbox for "Team member is the Lead CRC" which is currently unchecked.
- Action Buttons:** At the bottom, there are four buttons: "Edit team member" (highlighted with a blue arrow), "Submit edit", "New team member", and "Cancel edit".

Black arrows in the image indicate the following sequence of actions:
1. An arrow points to the "00-0000" COMIRB number in the Protocols column.
2. An arrow points to the "teststudy@cuanschut.edu" email address in the Team Members table.
3. An arrow points to the "Edit team member" button at the bottom.
4. An arrow points to the "Remove" button in the Member Status form.

4.1.3 To change or designate the Lead CRC status, select your COMIRB number in the left column, select “edit team member”, then select the team member you would like to edit, and select the “Check Box” for the Lead CRC to select or de-select. Then select “submit edit” to finalize the update. There can be multiple Lead Clinical research coordinators on a study. The study PI can be listed as the Lead CRC as well. **The Lead CRC(s) assigned to the study will receive all study notifications and status changes via email.**

Protocols Team Members Member Status

Please select a team member email if no item is displayed

COMIRB Number	Team Member Email
00-0000	teststudy@cuanschutz.edu
11-1111	kyla.wulff@uhealth.org
22-2222	
33-3333	
44-4444	
55-5555	

Team member email address Remove

Protocol Number

Name of Principle Investigator

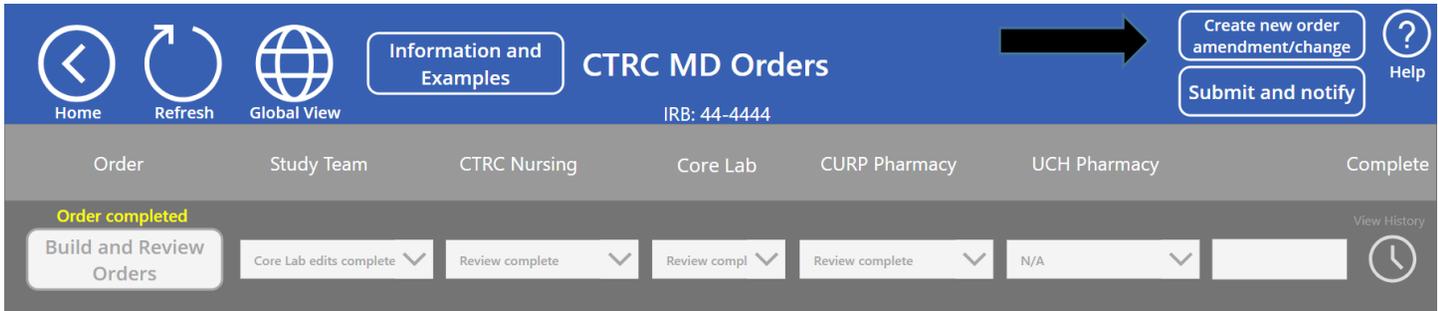
Principle Investigator email address

Team member is the Lead CRC

Note: Select the “cancel edit” button if an entry is made in error prior to submission.

SECTION 5: HOW TO CREATE AN AMENDMENT/CHANGE

5.1 If an amendment is required for MD orders, enter the Dashboard and select from the CTRC MD Orders page “Create New Order Amendment/Change” in the right-hand corner. This button will only display once an initial set of orders has been created and completed.



5.1.1 A text box will populate asking if an amendment has been submitted. Links for both COMIRB and HSR portal web pages are included for review on what requires and official amendment. Then select “Yes” or “No”. **If Yes:** Provide applicable amendment approvals from COMIRB/HSR. The study can then immediately begin building their amended orders in the Dashboard. **If No:** The study must provide rationale for the reason an official amendment is not necessary and a general summary of changes. The study can then begin building their updated orders.

Has an official HSR/COMIRB amendment been submitted for this change? Yes No

If the MD order changes require an official amendment to either the HSR Portal or COMIRB, please follow the links below to submit or review criteria for amendments:

[Colorado Multiple Institutional Review Board \(COMIRB\)](#): This page provides conditions for amendments to orders and submission details.

[Human Subject Research Portal \(HSR Portal\)](#): This page provides conditions required for amendments and submission details.

Has an official HSR/COMIRB amendment been submitted for this change? Yes No

Please attach your amendment document below:

There is nothing attached.

 Attach file

I attest that to the best of my knowledge this is true

Has an official HSR/COMIRB amendment been submitted for this change? Yes No

Please provide rationale as to why an official IRB/HSR amendment is not needed. Also provide a general summary of changes requested.

Provide rationale and summary of changes

I attest that to the best of my knowledge this change does not require an official HSR/COMIRB amendment

5.1.2 The study/PI received a copy of the signed orders through DocuSign and can build their updated orders based on this document with the blank template auto-populating into each new folder. If the study is unable to recover their signed set of orders, a **signed** set can be provided to them from the nursing team outside of the Dashboard as a PDF file only.

5.1.3 When reviewing all change/amendment orders, **ensure Track Changes or highlighting are provided by the study team outlining what has been changed from the original/prior order set.** Changes/amendments without Track Changes or highlighting will not be accepted and will need to be edited.

5.1.4 Begin building MD orders the same as referenced above in [Section 2.3](#).

SECTION 6: STUDY STARTUP PRIOR TO DASHBOARD

6.1 All studies are to be managed through the dashboard. Please review and utilize [this document](#) for any studies with Startup prior to the Dashboard inception.

Resources & Contacts

Website	Contacts
CTRC Administration	cctsi.helpdesk@ucdenver.edu
CTRC Billing/MicroGrants	Kristen.House@cuanschutz.edu
Adult CTRC Nursing	CTO-CTRC.RNProtocols@cuanschutz.edu
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