



ADULT CTRC STUDY STARTUP PORTAL USER MANUAL

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CHAPTER 1: IMPORTANT TIPS FOR SUCCESS

- All users need to use **UCD credentials** to log into the portal.
- **VPN access is required** to access and use this portal.
- Users can update the notification email in the portal to a different email, if preferred. Email CCTSI.Helpdesk@ucdenver.edu to request this update.
- All study visits should be grouped if the study procedures are exactly the same. Consider the need for identical services for CTSC nursing, Pharmacy, and Core Lab at each visit.
- All providers added to the nursing form must have University of Colorado Privileges
- If a core is not required for a certain visit- leave the form blank and unsaved
- When making requested edits to nursing/pharmacy/core lab forms, ensure all edits for all cores are completed before submitting for review
- The chat function should be used as the primary communication within the portal regarding all questions and edits
- The chat does not generate any notifications to the CTSC, only a submission of orders will generate notifications
- To submit an amendment or change to orders, navigate to the “need help” tab to find the amendment/change tile and submit the request form
- **When submitting an amendment or change, do not delete any visits.**
 - Amendments/changes:
 - **Do Not Delete** any initially submitted visits as this is considered part of the “order set”.
 - Make changes and amendments only to the applicable visits.
 - Add new visits as part of the amendment as needed.
 - When the changes needed have been made, all original unchanged visits must be submitted with the newly updated visits as a ‘complete order set’.
 - Provide details in the chat of the changes made to each visit
- If you have any questions regarding the portal, technical issues or study startup questions, please email CCTSI.Helpdesk@ucdenver.edu

CHAPTER 2: REQUESTING PORTAL ACCESS

- A. **CTRC Study Startup Portal can be accessed via [CTRC services overview](https://cctsi.cuanschultz.edu/resources/ctrc/services/services-overview) page.** The portal link, and all the information and updates will be posted here. You can bookmark this important page.

<https://cctsi.cuanschultz.edu/resources/ctrc/services/services-overview>

B. **Logging into the Adult CTRC Study Startup Portal:**

- a. **Access the Portal Link on the [CTRC services webpage](#)**
- b. Log into the portal using **UCD credentials only**
- c. **VPN access is required** for using the portal
- d. CHCO users needing to access this portal will also need to login with UCD credentials
- e. If you are unable to login, proceed to Step C

C. **Requesting Access to the Portal**

- Go to the [CTRC Services Overview page](#)
- This will lead you to the area that has the **Access Request form** for the portal. Complete this REDCap form. Once the Adult CTRC admin has processed the request, the study team will be notified.

To request portal access

Access Request Form

To request or update user access to Adult CTRC protocols on the portal

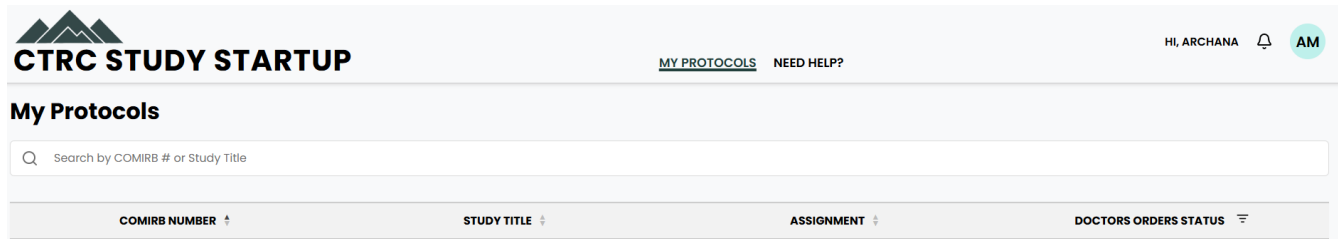
- **To make updates to user access like adding new users** to a protocol, complete same access request form shown above. There is an option to update users. Adult CTRC admin will notify study team when the new users have been added to a protocol.

- **Scheduler and CTRC Data Folders access**

The above redcap form applies not only to the Adult CTRC Study Startup Portal, but also provides access to CTRC Scheduler and CTRC data folders (for Nutrition, Echo, and Core Lab data). You may utilize this form to request access to these CTRC programs.

CHAPTER 3: NAVIGATING THE PORTAL

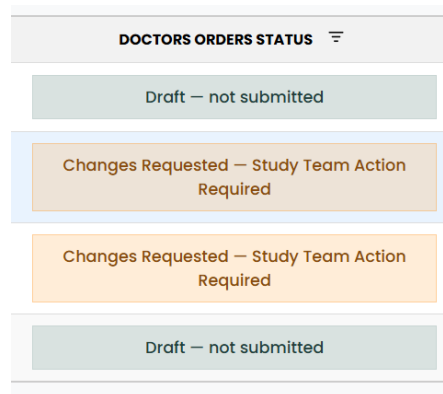
Home Screen



A. My Protocols

All protocols that a user has access to are listed under the 'My Protocols' tab. For each protocol listed the following can be viewed:

- COMIRB number
- Study Title
- Assignment or role (this will be designated as 'Study team' for PI, Co-PIs, and coordinators)
- Doctors Orders Status (indicates if the orders are in draft mode, needing changes, review mode, or complete)



B. Need help?

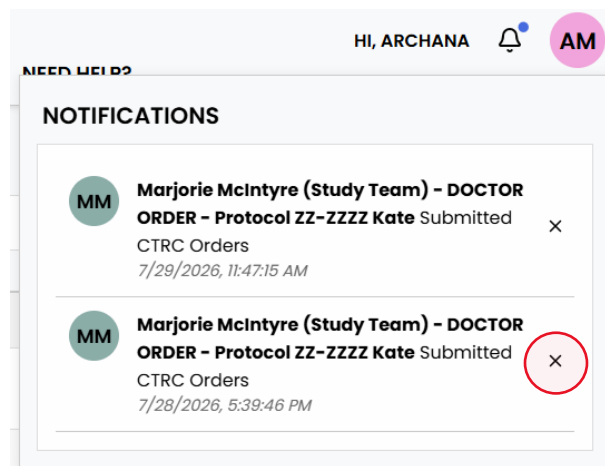
This tab opens a new window with key resources

- **Adult CTRC Study Startup Portal resources like**
 - Portal Access Request form
 - Portal Change Request form (includes amendments)
 - User training materials like User manual and User Video

- **Need more help?** - This tab is to address any questions that do not get covered in the resources posted on the portal or this user manual. Users can email the CCTSI.Helpdesk@ucdenver.edu inbox with additional queries.

C. Notifications

- On the top right corner is the Notification bell icon. All notifications coming in from nursing, core lab, or pharmacy will populate here.



- The notification lists the senders' name, their role, protocol number, and action taken.
- Clicking on a particular notification will take the user directly to that protocol to take further action as needed.
- To remove notifications from the list, select “x”

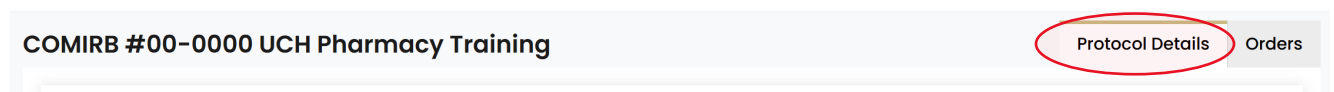
D. Search Bar

Enter the protocol number in the search bar. The protocol will be listed below if found.



E. Protocol Details View

In my protocols, click on a protocol and the Protocol Details will be on the right top of the screen.



This view shows the **key protocol details** like COMIRB number, study title, and study type (Investigator or industry-initiated).

PROTOCOL DETAILS

COMIRB Number *	Protocol Status *
AA-AAAA	Active
Study Title	
Role of Lifestyle and Nutrition on weight in Adult with T2DM	
Study Classification	
IIT	
Protocol Notes	
N=50, Men and women	

This view also displays the **Principal Investigator** details as shown below

PRIMARY INVESTIGATOR SUMMARY

First Name*	Last Name*
Bob	PI
Credential(s)	Title
MD	Dr.
Department	Division
Biomedical Informatics	Biomedical Informatics and Personalized Medicine
Email	Phone Number
bob.pi@uch.edu	

You can also see various **personnel** across different teams allocated to work on this protocol by scrolling to the bottom.

PROTOCOL PERSONNEL ^

FIRST NAME	LAST NAME	ASSIGNMENT
Rebecca	Baldermann	CTRC Core Lab
Abi	Buell	Study Team
Archana	Mande	CU Research Pharmacy
Marjorie	McIntyre	Study Team
Kathryn	Pierce	Adult CTRC Nursing
Kyla	Wulff	Meeting and DocuSign Coordinator

F. Orders View

COMIRB #00-0000 UCH Pharmacy Training

Protocol Details Orders

Within the orders view you can see the status bar within the Orders section indicating the status for various cores involved

Waiting on Cores to Review Orders		
ADULT CTRC NURSING	CTRC CORE LAB	CU RESEARCH PHARMACY
...	✓	✓

- This status indicates the **core is still reviewing the orders**

ADULT CTRC NURSING



- This status indicates that the **core is awaiting changes from the study team**

UCH PHARMACY



- This status indicates that the **core has approved the orders**

CTRC CORE LAB



G. History Log

This view allows users to track the progress made on orders for a particular protocol chronologically from new to old. The log includes sender names, roles, action taken, and any additional comments made. This is an at-a-glance view of all actions taken on a given set of orders.

HISTORY LOG

AM	Archana Mande (CU Research Pharmacy) — Approved: everything looks good. Thanks and all set! 7/29/2026, 11:49:06 AM
MM	Marjorie McIntyre (Study Team) — Submitted CTSC Orders 7/29/2026, 11:47:15 AM
RB	Rebecca Baldermann (CTSC Core Lab) — Approved 7/29/2026, 11:21:34 AM
AM	Archana Mande (CU Research Pharmacy) — Requested Changes: On Dosing visit, can you clarify if benadryl can be used for reactions. 7/29/2026, 11:02:10 AM

H. Study Visit Screen

- The relevant cores for the protocol will have their specific form within each study visit.
- From this area users can complete the forms for each core

CHAPTER 4: BUILDING STUDY VISITS

A. Nursing

a. My Protocols

- i. Select “My protocols” tab to view all protocols assigned to you



*If your protocol is not displaying, navigate to the “**Need Help?**” tab and **select “Access Study Startup Portal resources button”**. This will take you to **Access request form** to get access to specific protocol.



Adult CTRC Study Startup Portal User Resources

Request forms, training materials, and resources for:

- ☐ Access requests
- ☐ Change requests (includes amendments)
- ☐ User training materials

Access Study Startup Portal Resources

- b. Select your protocol, or enter the COMIRB/title within the search function

My Protocols

Q Search by COMIRB # or Study Title

COMIRB NUMBER ▾

STUDY TITLE ▾

Test COMIRB

Test Study

- Select Start New Visit

COMIRB #00-0000

Draft — not submitted

CTRC ORDERS

+ Start New Visit

HISTORY LOG
No History Yet

- c. Name the Visit- Ensure you are grouping orders that are exactly the same

Start New Doctor Order Visit

Visit Title *

Screening, EOT, Unscheduled Visit

Cancel

Submit

NOTE: In the event a visit is incorrectly named, 2 options are available:

- If the visits already contain data entries: select “start a new visit”, then select “Yes” to Clone a New Visit. Then the original incorrectly named visit can be deleted.

Start New Doctor Order Visit

Clone a Previous Visit? ☐ Yes

Visit Title *

Visit Title

Cancel

Submit

- Delete the visit by selecting the visit. Then select “delete order set”.

Delete Order Set



- Select the visit name to enter each form

- d. On the left, review the current forms for the requested cores for this clinical trial

CTRC STUDY STARTUP

 Go Back to All CTRC Orders

COMIRB #00-0000

CTRC Orders — Screening, EOT, Unscheduled Visit

Adult CTRC Nursing

Not Yet Started

CU Research Pharmacy

Not Yet Started

CTRC Core Lab

Not Yet Started

 Delete Order Set

Please select a form from the left to begin

- e. Select the first form you would like to complete

i. Adult CTRC Nursing Form, Pharmacy, CTRC Core Lab Forms

1. A form must be completed for each department for each visit
 - a. If Core Lab or Pharmacy forms are populated but are not needed at this study visit, leave blank.
 - b. If a form for a required core is not populated, and required for the study, contact the CCTSI.Helpdesk@ucdenver.edu
2. Fill out all fields with required entries. Pay close attention to gray placeholder text providing specific prompts for details needed.
 - a. All providers listed must have current University of Colorado privileges
 - b. You must complete all fields on each form to save; however, this will be saved as a draft and can be returned to later for completion. Placeholders can be used if information is not available at the time of completion
3. When complete, press **save** at top right. This is not a submission, only a saved draft.
4. The arrow at the bottom right will take you back to the top of the form

Cancel

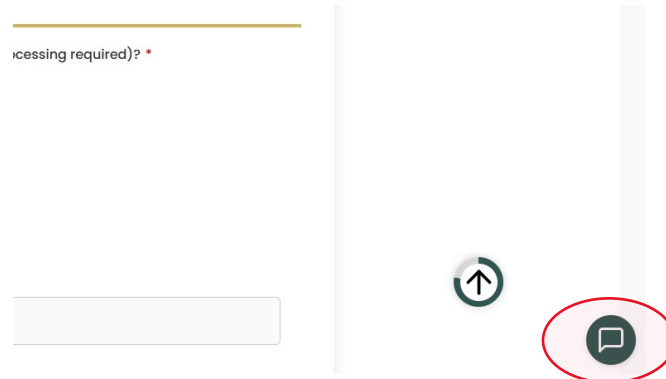
Delete

Save

Editing Mode You are in **editing** mode. Your changes will not be saved until you select **Save**.

f. At any time, the Chat function can be used to ask questions or provide additional information

- i. Note: the chat function does not send notifications



- ii. Users can initiate a new conversation by clicking on the **'+ New Thread'** icon.
- iii. User can view the role of who has posted the chat to be sure before replying.

#00-0000 UCH PHARMACY
TRAINING ORDER CHAT

+ New Thread

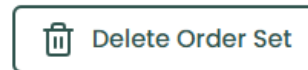
AM

Archana Mande UCH Pharmacy 09/16/2026, 02:13 PM
Visit 1: Can you please add details on the route of study med?

- **To start a chat**, state the Visit number or name so that it is easy for the cores to reply accordingly.
- You can start a new thread for each visit or each core so that it is easy for them to reply back within the thread.
- **To reply to a chat**, keep the reply within the thread to avoid confusion.
- You can use “expand replies” feature to view all replies on a specific topic.
- Chat feature is an excellent way to share important notes about the orders to help cores review or answer any queries within this shared portal.

g. Delete Order Set

- i. This function will delete all forms within the visit and cannot be undone
- ii. This should not be used in the event of amending or changing orders- all original orders should be kept in addition to the changed/amended orders



Confirm MD Order Delete?

Are you sure you want to delete **Screening, EOT, Unscheduled Visit** MD Order bundle?

Amendments or Changes: all order sets from initial submission should not be deleted. Only update visits requiring changes, all other visits will remain unchanged and submitted as a set.

If a required order set is deleted it will need to be rebuilt by the study team.

Would you still like to delete? This action **cannot** be able to undone.

☐ I have read the information and would still like to delete.

No, do not delete

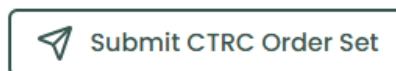
Yes, Delete

h. Select arrow next to “Go Back to all CTRC Orders” to add new visits and/or submit

- i. Repeat process from [Step C](#) to enter additional visits

i. To submit for review, select “Submit Order Set” to submit all visits

- i. Note: Selecting the “Submit Order Set” will submit all orders for Pharmacy, Core Lab, and Nursing
- ii. Blank forms will not be sent



j. The History Log will display all status updates

k. The status bar will also show updates throughout the process

Waiting on Cores to Review Orders		
ADULT CTRC NURSING 	CTRC CORE LAB 	CU RESEARCH PHARMACY 

- l. **Once orders are submitted to each department, they will be reviewed and may be returned for additional changes. Study teams will receive email notification of changes needed to the orders. The chat feature will be utilized to provide edits required. Each core may request additional changes on a different timeline.**
 - i. For example, nursing may review early in the week and request changes. Core Lab may review later in the week and request changes.
 - ii. Individual forms for each core will unlock to allow changes to occur if requested.
 - iii. Enter each set of orders to make required updates
 - iv. Select “Submit CTRC Order Set” **when all requested edits across all core forms have been completed.**
- m. **Once all orders are approved, the documents will be entered into DocuSign for final signatures and approvals**
 - i. A final copy will be provided via DocuSign to all parties (including study coordinator)

Final Approvals Complete — DocuSign in Progress

- n. **Within the portal the study will be marked as completed**

Orders Completed

SECTION 4.1: NURSING FORM TIPS

- B. Read through gray placeholder text first, before typing entry, to confirm what specific details to provide in each free text box. The text will return upon removal of entry.**

Special Considerations: *

Often N/A but please specify things like:

- Room with full bed.
- negative flow room only.
- Room that can accommodate a wheelchair
- Participants with developmental delay, please allow extra time for procedures.

Diet & Fasting: *

Note any dietary restrictions or fasting requirements such as:

- Supplied by CTRC Nutrition Core as per protocol
- No other food or beverage allowed except water
- Participant must consume all food provided
- Please contact X if any food is left over
- NPO
- Fasting with required length in hours
- Meal provided by study team
- N/A if not applicable

Activity: *

Note any physical activity requirements such as: • Supine resting prior to procedure

- No sleeping
- Bedside commode required
- Participant to remain resting during study visit
- N/A if not applicable

Stop Criteria and Call Parameters (Standard Call Orders: BP >180/100 or <90/50, HR >120 or <40, RR >20 or <6, and BG >250 or <50): *

Specify individual stopping criteria such as:

- Changes to standard call parameters
- Stop if side effect X is observed and contact MD
- If Temperature > 39°C, do not administer medication and contact MD
- EKG call parameters
- Per Coordinator/MD discretion

Please provide required specifications: *

- Who will complete EKG
- Resting requirements
- Triplicate interval
- Timepoints required with window
- Any additional details
- N/A if not applicable

Venous Access Notes: *

- Central line use
- Port access
- N/A if not applicable

Additional Lab Notes

Please include if sample processing will occur on Inpatient CTRC and who will process these samples.

Discharge Criteria: *

- Observation requirements
- Injection site monitoring
- IV discontinuation
- N/A if not applicable

C. Examples of Completed MD Order Tables

Tubes to be provided by: *

- ☒ CTRC
☐ Sponsor

CTRC Tubes to be provided:

TIMEPOINTS	TUBES
T-15	Purple Top(2) X
T = 0	Red top(2), Purple Top(1), Green top (4) X
T + 30	Green top(3), Blue top(1), Red Top(1) X

Add Row

UCH Clinical Lab to be Collected - Reference [UCHealth Lab directory](#) for lab codes

TIMEPOINT(S)	ASSAY NAME & LAB CODE
T-30	CBC w/ WBC Diff Lab 210 X
T-15	Hepatic Panel Lab 20 X
T=0	Type and Screen Lab 276 X

Add Row

SECTION 4.2: CORE LAB FORM TIPS

- Complete core lab form for each individual visit
- Leave blank if a certain visit does not have core lab samples
- If the Lab Manual was uploaded in Oncore with other protocol documents then select Oncore below, if not, then email the Lab Manual to CTRCCoreLab@cuanschutz.edu
- Within the Core Lab Form, indicate whether the study is **Industry-Initiated** or **Investigator-Initiated**

A. For Industry-Initiated Studies

▪ **Laboratory Manual Acknowledgment**

- This acknowledgment confirms that the laboratory manual has been shared through Oncore or sent to the shared Core Lab email.

Important: Before attaching or forwarding any laboratory manual:

- Confirm that the document contains **sample processing instructions**
- Do not assume a file titled "Lab Manual" includes processing instructions
 - In some cases, sponsor documents may only contain Collection instructions, Shipping instructions, General study information
- Processing instructions may be included in a separate PDF as a table

▪ **Sample Analysis Requirement**

If "No" is Selected: No additional information is required. Click **Save**. The CTRC Core Lab section is complete.

If "Yes" is Selected: Complete the following information for each analyte:

- Time Point (could be hours or minutes examples): 0,30, 60 minutes or 1, 2, 3 hrs
- Assay Name:
 - Avoid using acronyms alone.
 - Whenever possible, enter the full assay or analyte name to ensure the request is clearly communicated
- To add entries, click **Add Row**
- Preferred Sample Type:
 - If no preference: enter NO
 - If a preference exists: specify the analyte and preferred sample type.
 - For example: insulin, serum
 - This is important because some analytes can be measured using more than one sample type (for example: plasma or serum).
- After completing all fields, click **Save**.

B. Investigator-Initiated Studies

▪ Question re: Exact Copy of Another Protocol

- This option should only be used when the study is essentially a continuation or duplicate of a previously approved study, and the information can be copied directly.
- If "Yes" is selected: provide the referenced **COMIRB number**
- If "No" is selected: Provide:
 - **Time Point** – Include minutes or hours
 - **Assay Name**- Use full assay or analyte names whenever possible. Do not rely solely on acronyms. This helps ensure requests are communicated clearly and accurately.
 - **Hold Analysis designation**- Samples will be processed, aliquoted, then stored without analysis until Study team pickup for storage at an alternative location until samples are ready to be returned to the lab and analyzed. This option clarifies that samples should be “on hold” for analysis so the study team will pick up samples until time of analysis. Reasons for samples to be on hold is for batch analysis or for funding confirmation. If some analytes are on hold and others are not, create separate rows so the distinction is clear.
 - **Important Note: CTRC Core Lab will no longer hold samples designated as "Hold Analysis" during the study enrollment and collection period. Study Teams need to store these at an alternate location till ready for analysis.**

- To add rows, click **Add Row**.

Please list the analyte, timepoints, and if you prefer to have the sample placed on hold until requested:

TIMEPOINT	ASSAY NAME(S)	HOLD ANALYSIS
0	Insulin, Glucose, C-Peptide, FFA, Lipid Panel	☒ X
10	Insulin, Glucose, C-Peptide	☐ X
20	Insulin, Glucose, C-Peptide	☐ X
60	Insulin, Glucose, C-Peptide, FFA	☐ X
120	Insulin, Glucose, C-Peptide	☐ X
180	Insulin, Glucose, C-Peptide, FFA	☐ X

- **Preferred Sample Type** – This is commonly used when continuing a previous study, comparing results across studies and maintaining consistency with prior collections.
 - If no preference: enter No
 - If a preference exists: Specify the analyte and preferred sample type. For example: insulin, serum
 - This is important because some analytes can be measured using more than one sample type (for example, plasma or serum)

▪ **Samples Processed for Use Outside the CTRC Core Lab (PI Samples)-**

- **Definition:** These samples are processed but not analyzed by the CTRC Core Lab. They are stored separately from Core Lab analysis samples.
- The study team is expected to retrieve these samples within **one month of the collection date**.
- **If "No" is Selected:** Click **Save**. The CTRC Core Lab section is complete.
- **If "Yes" is Selected:** complete the table with following information:
 - **Time Point-** Include the unit of measure like minutes or hours.
 - **Sample Type-** select from the drop down
 - **Number of Aliquots-** select from the drop down
 - **Volume per Aliquot** - Enter the preferred volume for each aliquot. A common selection is **500 µL (microliters)**
 - To add entries, click **Add Row**.

Do you need samples for use outside of the CTRC Core Lab? (There is an additional charge for short term sample storage of inventory samples)

- ☐ No
☒ Yes

What is/are the analyte, and timepoints?

SAMPLE TYPE	# ALIQUOTS	VOLUME
Plasma ▾	4 ▾	500ul ×

- **Final Step** - Review the information for accuracy
- Click **Save**.

SECTION 4.3: CURP OR UCH-IDS PHARMACY TIPS

- a. It is important to include PRN (as needed/emergency) medications for any medication administration completed by the CTRC Nursing team with the potential for reaction.
 - Include indication for the medication, for example: 650mg Acetaminophen oral once for fever
- b. Reference the CTRC policy regarding [Hypersensitivity Protocol IP & OP](#) for specific medications and recommendations for reactions
- c. Leave pharmacy form blank if a certain visit does not have pharmacy needs.
- d. Refer to the grey text below while completing the pharmacy form.

UCH PHARMACY FORM

PREDOSE MEDICATIONS

Predose Medication 1

×

Medication Name:
Ex: Acetaminophen

Medication Dose:
Ex: 650 mg

Route of Administration:
Ex: PO, IV infusion over 30 minutes

Frequency:
Ex: Once daily, q6h for headache

Special Administration Instructions:
*Ex: special tubing, special handling, or addition of an in-line filter.
You may insert an image of an infusion table here.*

STUDY MEDICATIONS

Study Medication 1 ×

Who will be administering the study drug?

- Participant(self-administered)
- CTRC nurse or health care professional from study team
- Other: (Please Specify)

Medication Name:

Ex: Acetaminophen

Medication Dose:

Ex: 650 mg

Route of Administration:

Ex: PO, IV infusion over 30 minutes

Frequency:

Ex: Once daily, q6h for headache

Special Administration Instructions:

Ex: special tubing, special handling, or addition of an in-line filter.
You may insert an image of an infusion table here.

PRN MEDICATIONS

PRN Medication 1 ×

Medication Name:

Ex: Acetaminophen

Medication Dose:

Ex: 650 mg

Route of Administration:

Ex: PO, IV infusion over 30 minutes

Frequency:

Ex: Once daily, q6h for headache

Special Administration Instructions:

Ex: special tubing, special handling, or addition of an in-line filter.
You may insert an image of an infusion table here.

CURP PHARMACY FORM

PREMEDICATION

Are premedication's required?

- ☐ No
☒ Yes

Premedication 1



Name of premedication and formulation (Use generic name):

Example: prochlorperazine (Compazine) tablet or injection solution

Administration instructions. Include dose, route of administration, frequency, timing of dose, rate (if applicable), and any other pertinent information:

Example: Administer 125mg via IV injection over 5 minutes x1, 35-40 minutes prior to infusion of study drug

Special administration or handling instructions:

Example: Administer additional of in-line filter, specific type of tubing, etc.

Additional comments or notes:

STUDY DRUG

Study Drugs 1



Who will be administering the study drug?

- Participant (self-administered)
- CTRC nurse or health care professional from study team
- Other: (Please Specify)

Name, dosage strength, and formulation of study drug (including placebo, if applicable):

Examples: Tirzepatide 20mg/ml or placebo solution for injection; Deupirfenidone 275mg or pifenidone 267mg capsules

Administration instructions. Include dose, route of administration, rate (if applicable), frequency, and any other pertinent information:

Examples: inject 5mg or placebo (0.25ml) subcutaneously once weekly; Take 3 capsules (825mg or 801 mg) by mouth three times a day

Special administration instructions:

Examples: Injection around abdomen as directed by study team; Take capsules on an empty stomach with a full glass of water

Additional comments or notes:

PRN (AS NEEDED) MEDICATION

Do PRN medications need to be available?

- ☐ No
☒ Yes

PRN Medication 1



Name of PRN med and formulation (Use generic name):

Example: prochlorperazine (Compazine) tablet or injection solution

Administration instructions. Include dose, route of administration, indication, frequency, rate (if applicable), and any other pertinent information:

Example: 5mg by mouth or IV every 6 hours as needed for nausea or vomiting

Special administration or handling instructions:

Example: Addition of in-line filter, specific type of tubing, etc

Additional comments or notes:

CHAPTER 5: AMENDMENTS & CHANGES

- Go to the [CTRC Services Overview page](#)
- This will lead you to the area that has the **Change request form** for the portal. Complete this REDCap form. Once the Adult CTRC admin has processed the request, the study team will be notified.

To request protocol changes or amendments

Change Request Form

To request changes or amendments to MD Orders or Core Lab Slips in the portal

- Provide all details within the form including if an official amendment has been submitted and detailed description of the changes requested and rationale for the changes.
- CTRC admin will make the protocol available in the portal to allow for changes and amendments.
- Log into the Portal and begin to make changes to the visits. Begin from [Chapter 4 Section E](#)
- Important- Must Read for amendments/changes:**
 - Do Not Delete** any initially submitted visits as this is considered part of the “order set”.
 - For example: 3 visits below, only visit 2 needs to be updated. Update visit 2 and submit all visits as a set.

CTRC ORDERS

 Start New Visit

Visit 1

Visit 2

Visit 3

 Submit CTRC Order Set

- Make changes and amendments only to the applicable visits affected by the change/amendment.
- Add new visits as part of the amendment as needed.
- When the changes needed have been made, all original unchanged visits must be submitted with the newly updated visits as a ‘complete order set’.
- If a visit name needs to be changed, select “start new visit”, then select “clone” visit. Rename the new visit name and delete the original.

Start New Doctor Order Visit

Clone a Previous Visit? ☐ Yes

Visit Title *

Visit Title

Cancel

Submit

- g. **Create a chat notifying the nursing team of what visits have been changed/added and what exact changes have been made.**
- h. The rest of process of orders finalization and DocuSign will be same as during the original set of orders.

CHAPTER 6: COMMUNICATION & NOTIFICATIONS

- a. **The notification email can be updated in the portal to an alternate email if preferred. Email the CCTSI.Helpdesk@ucdenver.edu to request this change.**
- b. **The portal will send email notifications to the study team when:**
 - Changes are needed
 - Core reviews are completed
 - The study visits are approved and sent for DocuSign
 - The study visits are signed and finalized
- c. **The chat function should be used as a primary means to communicate questions and edits needed within the orders, or updates in the process.**
 - Review the chat upon entering each study in the portal
 - The chat function does not send any notifications
 - Details for utilization of the chat can be found in [Chapter 4](#)