## Introduction to Abstracting Participating Sites - Include v4.5

Trials are conducted in participating sites. Information about the site (organization), investigator(s), and primary contacts (if a central contact is not provided) must be abstracted. Information about participating sites can be included in the protocol document or in the Participating Sites document.



The system assigns investigators and primary contacts a status code that corresponds to the person's/role's curation status.

## **Abstracting Participating Site Information**

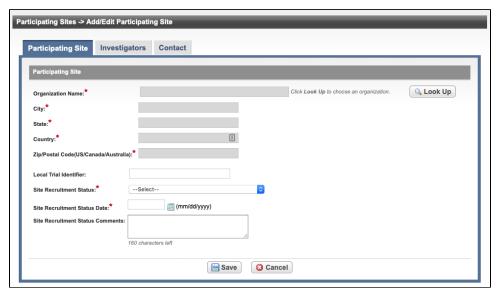
- 1. Search for the trial of interest. For instructions, refer to Searching for Trials in PA.
- 2. In the search results, select the NCI Trial Identifier link for the desired trial. This will open the **Trial Identification** page.
- 3. On the **Trial Identification** page, check out the trial. For instructions, refer to Checking In and Checking Out Trials. (This checkout step is optional for Super Abstractors.)
- 4. On the Administrative Data menu, select Participating Sites.

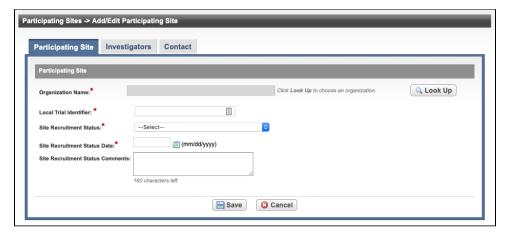


5. On the Participating Sites page, select Add.



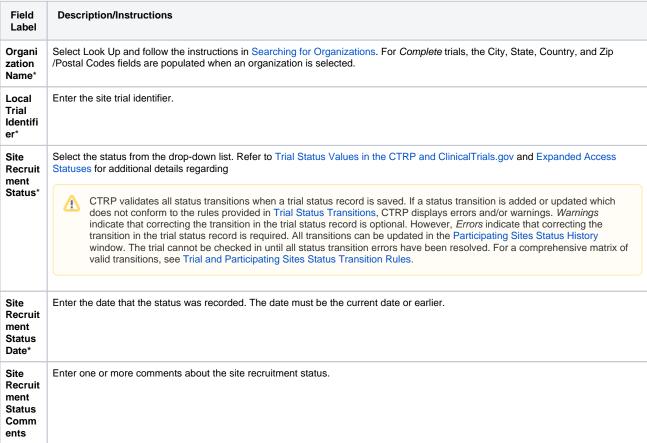
The Participating Sites page displays three tabbed sections: Participating Site, Investigators, and Contact.





Add/Edit Participating Site - Abbreviated Trial

6. See the following table for reference on the Participating Site fields. An asterisk (\*) indicates a required field.



- 7. Select Save.
- 8. Select the **Investigators** tab. The Investigators tab displays the trial investigators that may have been added during trial submission or abstraction



9. Select Add and search for the investigator's name by following the instructions in Searching for Persons.



10. When you find the investigator in the search results list, assign the investigator role, either **Principal Investigator** or **Sub Investigator**, and then click **Select**. The investigator selected will be added to the Investigators tab.



- 11. To indicate that an investigator is the primary contact, select the Set as Site Primary Contact icon next to this investigator's record.
- 12. Select the Contact tab.



A Participating Site must be linked to the trial before abstracting the site PI and contact information. A contact can be added by providing a person's name (i.e., someone who is associated with the trial itself), or a generic contact can be added (i.e., someone who is associated with the site but not necessarily the trial) by providing a person's title (functional role). Both types of contacts can not be added in the same record. An abstraction cannot be completed if a primary contact is not assigned.

If an investigator is designated as the primary contact (on the Investigators tab), the investigator's name is displayed on the Contact tab.



- 13. On the **Contact** tab, next to the **First Name** field, select **Look Up** and search for the contact person's name by following the instructions in Search ing for Persons.
- 14. In the various fields, specify the appropriate information. The following table describes the fields. An asterisk (\*) indicates a required field.

Field Label	Description/Instructions
Phone Number*	Enter the contact's primary telephone number (as 123-456-7890), including an extension if provided.  *Either the contact's phone number or email address are required. Both can be provided.
Email Address*	Type the contact's primary email address.  *Either the contact's phone number or email address are required. Both can be provided.
Status	CTRP populated after the record is saved.

15. Select Save.