


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**.

ADMINISTRATIVE DATA

[General Trial Details](#)

[NCI Specific Information](#)

[Regulatory Information](#)

[Regulatory Information](#)

[Human Subject Safety](#)

[Trial IND/IDE](#)

[Trial Status](#)

[Trial Funding](#)

[Participating Sites](#)

[Collaborators](#)

[Trial Related Documents](#)

5. On the **Participating Sites** page, select **Add**.

Participating Sites

Nothing found to display.

Add

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

Participating Sites -> Add/Edit Participating Site

Participating Site

Investigators

Contact

Participating Site

Organization Name: * Click Look Up to choose an organization.

Look Up

City: *

State: *

Country: *

Zip/Postal Code(US/Canada/Australia): *

Local Trial Identifier:

Site Recruitment Status: *

--Select--

Site Recruitment Status Date: *

(mm/dd/yyyy)

Site Recruitment Status Comments:

160 characters left

Save

Cancel

Add/Edit Participating Site- Complete Trial

Participating Sites -> Add/Edit Participating Site

Participating Site Investigators Contact

Participating Site

Organization Name* Click Look Up to choose an organization.

Local Trial Identifier*

Site Recruitment Status*


Site Recruitment Status Date* (mm/dd/yyyy)

Site Recruitment Status Comments:

160 characters left

Add/Edit Participating Site - Abbreviated Trial

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

Field Label	Description/Instructions
Organization Name*	Select Look Up and follow the instructions in Searching for Organizations . For <i>Complete</i> trials, the City, State, Country, and Zip /Postal Codes fields are populated when an organization is selected.
Local Trial Identifier*	Enter the site trial identifier.
Site Recruitment Status*	Select the status from the drop-down list. Refer to Trial Status Values in the CTRP and ClinicalTrials.gov and Expanded Access Statuses for additional details regarding <div>  CTRP validates all status transitions when a trial status record is saved. If a status transition is added or updated which does not conform to the rules provided in Trial Status Transitions, CTRP displays errors and/or warnings. <i>Warnings</i> indicate that correcting the transition in the trial status record is optional. However, <i>Errors</i> indicate that correcting the transition in the trial status record is required. All transitions can be updated in the Participating Sites Status History window. The trial cannot be checked in until all status transition errors have been resolved. For a comprehensive matrix of valid transitions, see Trial and Participating Sites Status Transition Rules. </div>
Site Recruitment Status Date*	Enter the date that the status was recorded. The date must be the current date or earlier.
Site Recruitment Status Comments	Enter one or more comments about the site recruitment status.

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.

Participating Sites -> Add/Edit Participating Site

Participating Site Investigators Contact

Participating Site Investigators for Albert Lea Medical Center-Mayo Health System

2 items found, displaying all items.1

PO-ID	Last Name	First Name	Role	Status Code	Set as Site Primary Contact	Delete
2363610	Audet	Isabelle	Principal Investigator	PENDING	<input type="button" value="Set"/>	<input type="button" value="Delete"/>
2329552	Bedrosian	Isabelle	Sub Investigator	PENDING	<input type="button" value="Set"/>	<input type="button" value="Delete"/>

9. Select **Add** and search for the investigator's name by following the instructions in [Searching for Persons](#).

PO-ID	CTEP-ID	First Name	Middle Name	Last Name	Address	Email	Role Code	Action
1283670	37629	Isabelle	Marie-Marthe	Audet	Warren, MI, USA, 48903	isabelle@audet.com	Principal Investigator	Select
1129959	37726	Isabelle		Bedrosian	Houston, TX, USA, 77030	bedrosian@bedrosian.org	Sub Investigator	Select

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.

Participating Site Investigators for Albert Lea Medical Center-Mayo Health System
2 items found, displaying all items.1

PO-ID	Last Name	First Name	Role	Status Code	Set as Site Primary Contact	Delete
1283670	Audet	Isabelle	Principal Investigator	PENDING		
1129959	Bedrosian	Isabelle	Sub Investigator	PENDING		

Add

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.

Participating Sites -> Add/Edit Participating Site

Participating Site Investigators Contact

Primary Contact for Mayo Clinic

First Name: * Alyssa

Middle Name:

Last Name: Jones

OR

Generic Contact:

Phone Number: **

Email Address: ** m@abc.com

**Enter either the contact's phone number or email address. You can provide both if the information is available.

Status: PENDING

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 [Searching 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**.