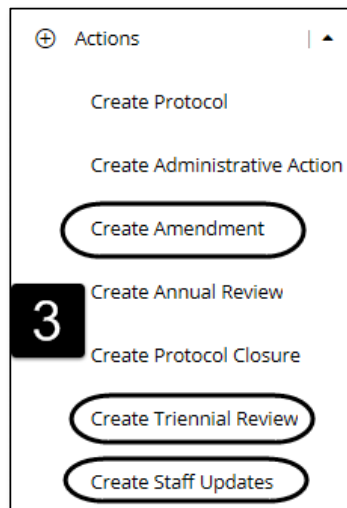


Introduction

The Staff section of Animals module presents a list of Study Staff and Non-study Staff members. It provides users the ability to add new Staff members to the protocol or remove existing Staff by creating an Amendment, Staff Update or a Triennial Review request.

STEPS

1. Click **Animals**
2. Select an existing active protocol from the landing page for which you would like to add new staff or remove existing staff
3. Select **Create Amendment** or **Create Triennial Review** or **Create Staff Updates** under Actions menu on the left navigation panel



4. Click **Staff** section on left navigation panel, note that it gets unlocked when Amendment or Triennial Review or Staff Updates request is created
5. The Staff page consists of two grids, one for listing the Study Staff members and the other for Non-study Staff members.
6. You can add new study staff members by clicking on **+ New Study Staff** link on the top right corner of the Study Staff grid

Staff

Study Staff (6) **5** **6** + New study Staff

Name	Organization	Role	Permission	Process	OCC Health Clearance	CITI	Staff Cert.	Contact
Allen*, Bob .	MGH > Surgery > Surgical Oncology	Co-Investigator	Manage	IR	Yes	Yes		<input type="checkbox"/>
Ford*, Kristi M	MGH > Surgery > Transplant Surgery	Co-Investigator	Manage	AME64	Yes	Yes		<input type="checkbox"/>
Herrera*, Wallace .	MGH > Surgery > Transplant Biology (TBRC)	Co-Investigator	View	AME56	Yes	Yes		<input type="checkbox"/>
Lamb*, Daryl .	MGH > Surgery > Transplant Biology (TBRC)	Co-Investigator	Manage	AME63	Yes	Yes		<input type="checkbox"/>
Mosley*, Tyson .	MGH > Surgery > Plastic Surgery	Co-Investigator	View	TR2	Yes	Yes		<input type="checkbox"/>
Watson*, Irma C	MGH > Surgery > Transplant Surgery	Principal Investigator	Manage	IR	Yes	Yes		<input checked="" type="checkbox"/>

Non-study Staff (3) **5** + New non-study Staff

Name	Organization	Permission	Comments	Contact
Blackwell*, Emma E	MGH > Surgery > Transplant Surgery	Manage		<input checked="" type="checkbox"/>
Hall*, Janis M	MGH > Surgery > Transplant Biology (TBRC)	Manage		<input checked="" type="checkbox"/>
Shah*, Tommy .	MGH > Surgery > Transplant Biology (TBRC II)	View		<input type="checkbox"/>

- Upon clicking **+ New Study Staff** link, a type ahead drop-down box is displayed
- You can enter the staff name or username in the search field and search for the staff from the drop-down list and select the person you would like to add
- Click **Add** to add the selected person to your registration, you can see a confirmation message in green to the right corner of the page

Staff

Study Staff (6) **7** **8** **9** + Add External Staff

Search:

Name	Organization	Role	Permission	Process	OCC Health Clearance	CITI	Staff Cert.	Contact
Allen*, Bob .	MGH > Surgery > Surgical Oncology	Co-Investigator	Manage	IR	Yes	Yes		<input type="checkbox"/>
Ford*, Kristi M	MGH > Surgery > Transplant Surgery	Co-Investigator	Manage	AME64	Yes	Yes		<input type="checkbox"/>
Herrera*, Wallace .	MGH > Surgery > Transplant Biology (TBRC)	Co-Investigator	View	AME56	Yes	Yes		<input type="checkbox"/>

- Selected person is successfully added to the Staff page
- You can select the role for the newly added staff member from the drop-down field for the new record that has been created
- The **OCC Health Clearance** and **CITI** training statuses are displayed on the grid for all the study staff members
- Click on the **Personnel Activities** link next to the Organization and an internal window opens where you can select the appropriate **Procedures** and **Qualifications** for the corresponding Study Staff
- After the Staff Certification is complete, a PDF copy is available under the **Staff Cert** column for the added staff member
- To add the staff member as a contact to receive notifications, select the checkbox in the **Contact** column

Staff											
Study Staff (7) + New study Staff											
Name	Organization	Role	Permission	Process	OCC Health Clearance	CITI	Staff Cert.	Contact			
Allen*, Bob .	MGH > Surgery > Surgical Oncology	Co-Investigator	Manage	IR	Yes	Yes		<input type="checkbox"/>			
Ford*, Kristi M	MGH > Surgery > Transplant Surgery	Co-Investigator	Manage	AME64	Yes	Yes		<input type="checkbox"/>			
Herrera*, Wallace .	MGH > Surgery > Transplant Biology (TBRC)	Co-Investigator	View	AME56	Yes	Yes		<input type="checkbox"/>			
Lamb*, Daryl .	MGH > Surgery > Transplant Biology (TBRC)	Co-Investigator	Manage	AME63	Yes	Yes		<input type="checkbox"/>			
Mosley*, Tyson .	MGH > Surgery > Plastic Surgery	Co-Investigator	View	TR2				<input type="checkbox"/>			
Villegas*, Salvatore.	> Partners Research Management	Co-Investigator	Manage	TR3	No	No		<input type="checkbox"/>			
Watson*, Irma C	MGH > Surgery > Transplant Surgery	Principal Investigator	Manage	IR	Yes	Yes		<input checked="" type="checkbox"/>			
Certification Form		Select...									

- 16. To add external study staff, click on the **+ New Study Staff** link
- 17. Note that a link **+ Add External Staff** appears at the top right corner of the study staff grid
- 18. Click **+ Add External Staff**

Staff											
Study Staff (7) + Add External Staff											
Start typing to initiate search											<input type="button" value="Add"/> <input type="button" value="Cancel"/>
Name	Organization	Role	Permission	Process	OCC Health Clearance	CITI	Staff Cert.	Contact			
Allen*, Bob .	MGH > Surgery > Surgical Oncology	Co-Investigator	Manage	IR	Yes	Yes		<input type="checkbox"/>			
Ford*, Kristi M	MGH > Surgery > Transplant Surgery	Co-Investigator	Manage	AME64	Yes	Yes		<input type="checkbox"/>			

- 19. An internal window pops-up where you can search for an external staff
- 20. Clicking on **Search** button presents a list of external staff members
- 21. Clicking on **Load more** button and scrolling down loads more external staff members
- 22. You can add a new person by clicking on **+ Add External Staff** link at the bottom left corner of the window

Name	Email	External Institution Affiliation	Start typing to initiate search	<input type="button" value="Search"/>	<input type="button" value="Clear Selections"/>	
Name	Email	Institution				
<input type="checkbox"/> Abbott*, Benito M	potlans@gmail.com	Boston University				
<input type="checkbox"/> Abbott*, Colin M	amtrocha@comcast.net	Temporo Pharmaceuticals				
<input type="checkbox"/> Abbott*, Heath M	Ingo.Schmuecking@siemens.com					
<input type="checkbox"/> Abbott*, Jodie M	molly_franke@hms.harvard.edu					
<input type="checkbox"/> Abbott*, Sean M	mschlesinger86@gmail.com	Brigham and Womens Hospital				
<input type="checkbox"/> Abbott*, Tony M	mglennon@vortexmed.com	Vortex Medical Inc				
<input type="checkbox"/> Abbott*, Trista M	ereidlen@gmail.com	Suffolk University				
<input type="checkbox"/> Acevedo*, Brendan H	kenneth_mayer@brown.edu					
<input type="checkbox"/> Acevedo*, Felicia .	mbhasin@bidmc.harvard.edu					
<input type="checkbox"/> Acevedo*, Gayle M	betty.gustave001@umb.edu	UMASS Boston				
<input type="button" value="+ Add External Staff"/>		<input type="button" value="Load more"/>	<input type="button" value="Add staff"/> <input type="button" value="Cancel"/>			

- 23. Another internal window pops up where you can enter the name, email, institution details of the external staff being added
- 24. Enter all required fields and click **Add** button

Form fields for adding a new staff member:

- First name * (Callout 23)
- Last name *
- Email *
- External Institution Affiliation * (dropdown)
- Partners Institution Affiliation (dropdown)
- External Affiliation (Callout 24)
- Buttons: Add, Cancel

25. The external person also gets added to the grid similar to step 10

26. You can add new non-study staff members by clicking on **+ New non-study Staff** link on the top right corner of the Non-study Staff grid

27. You can select the organization and permission values from the drop-down fields

Non-study Staff (4)

Name	Organization	Permission	Comments	Contact
Aguirre*, Harry A	MGH > Psychiatry	View		Added

Callouts: 26 (New non-study Staff link), 28 (Contact icon)

28. To remove a staff member, click on the **X** icon at the end of the staff record

29. Click **OK** to confirm staff deletion

30. After the staff deletion, you can see the deleted staff member striked off and in red text

31. You can undo the staff deletion by clicking on the **Undo** button

32. Staff deletion can be successfully restored after clicking Undo, you can find a confirmation message to the top right corner of the page

Staff

Study Staff (8)

Name	Organization	Role	Permission	Process	OCC Health Clearance	CITI	Staff Cert	Contact
Allen*, Bob	MGH > Surgery > Surgical Oncology				Yes			
Ford*, Kristi M	MGH > Surgery > Transplant Surgery				Yes			
Herrera*, Wallace	MGH > Surgery > Transplant Biology (TBRC)				Yes			
Lamb*, Daryl	MGH > Surgery > Transplant Biology (TBRC)				Yes			
Mosley*, Tyson	MGH > Surgery > Plastic Surgery				Yes			
Potter, Harry	Massachusetts-General-Hospital->Radiology	Personnel Activity	Select...	View	TR3	No	No	Deleted
Villegas*, Salvatore	PHS > Partners Research Management	Personnel Activity	Co-Investigator	Manage	TR3	No	No	Added
Watson*, Irma C	MGH > Surgery > Transplant Surgery	Personnel Activity	Principal Investigator	Manage	IR	Yes	Yes	

Message from webpage: Are you sure you want to delete Mosley*, Tyson? (Callout 29)

Callouts: 28 (Contact icon), 29 (OK button), 30 (Deleted record), 31 (Contact icon)