GOG Partners Portal – Roster Management

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V1

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GOG Partners Portal – Roster Management

- Rationale: allow management of institution and person data

- Benefits
  - Ownership of your site's roster.
  - Requests to add/remove personnel are not delayed and can be done immediately.
  - To retire paper roster form.
  - Easier and more reliable communication.
  - Streamline interest/feasibility (upcoming).

GOG Partners Portal – Roster Management

- Site Roles with edit/update capabilities
  - Site PI
  - Regulatory Contact
  - Site Study Coordinator

- What can be updated?
  - Some site information (site name, address)
  - GOG Primary Role assignments
  - Site roster
  - Study role assignments

Before You Begin

- You will need an active account within the GOG Partners Portal to view your site's roster.
- You must have an assigned role on your site's roster to make changes (i.e., PI, Study Coordinator and Regulatory Coordinator role).
- If you are one of the primary roles and no one at your site does not have access to GOG Partners Portal, please submit a roster form to GOGRegulatory@gog.org.
- Your username or email address can be used to log into the GOG Partners Portal.

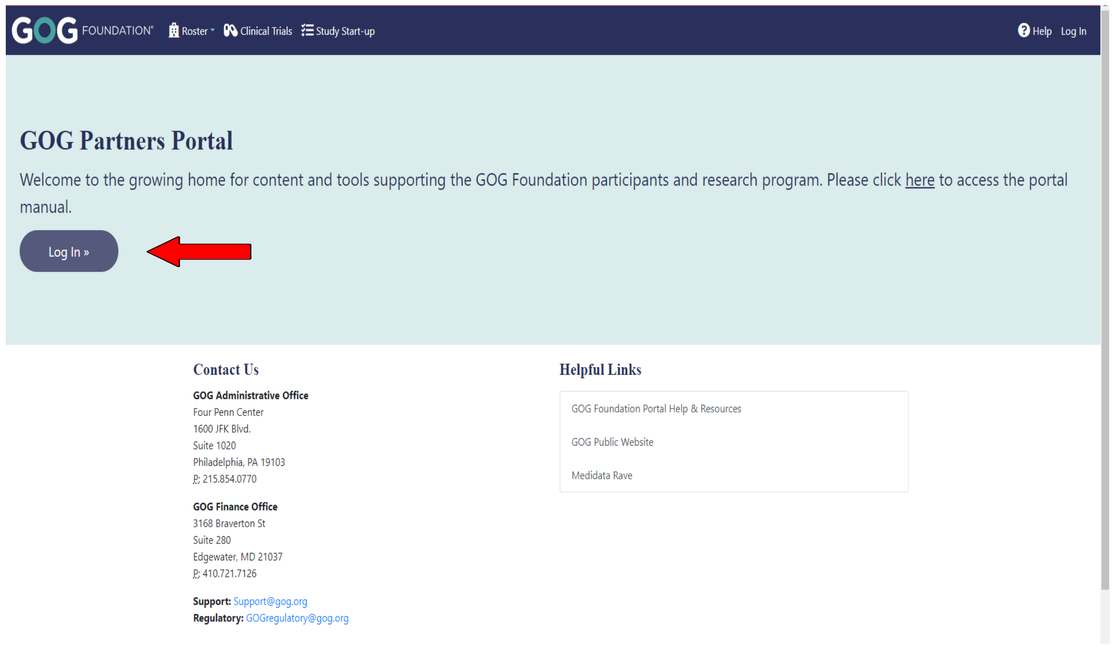
Accessing GOG Site and Person Rosters

- All site staff active within GOG Partners, with a valid account, may view limited details about GOG sites and personnel.
- When logging in, either your username and email address can be used with your password.
- Staff assigned designated **Primary Site Roles** can add/remove staff from their site roster and update certain site details.
- Specific contact details are available to users relative to the contact details they themselves have shared. For example, if you elect to share your Cell Phone Number, you will in turn be able to view the same contact information of your peers on the Roster

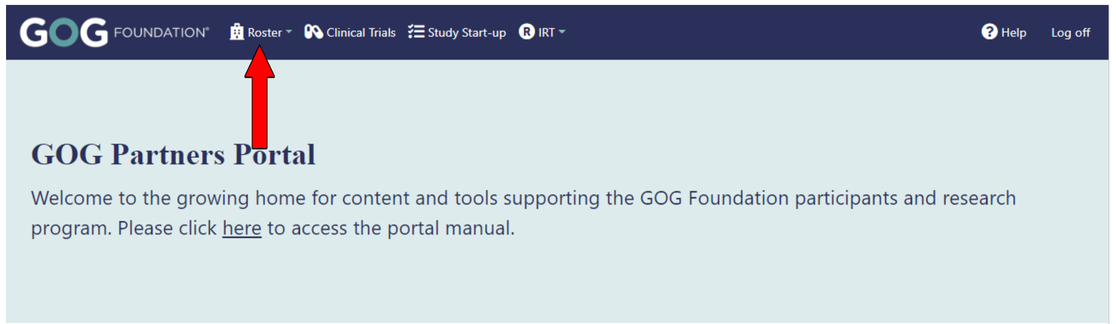
Primary Site Roles with edit access include Site PI, Regulatory Contact, and Site Study Coordinator

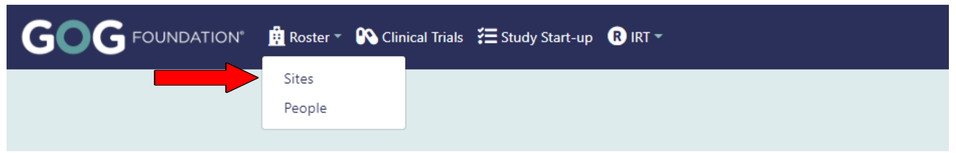
Accessing GOG Site and Person Rosters

Step 1: Use your GOG Username (or email) and password to log into the GOG Partners Portal.



Step 2: Hover over “Roster” to either select “Sites” or “People” to add personnel to your site’s roster.





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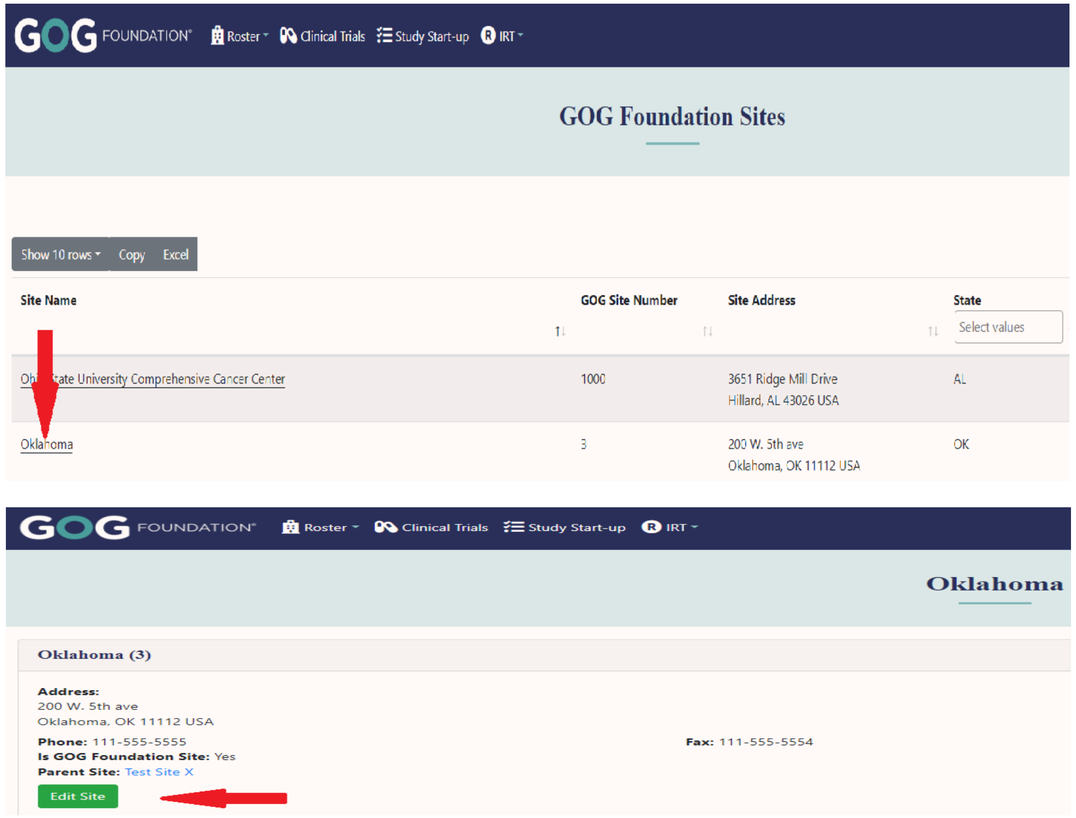
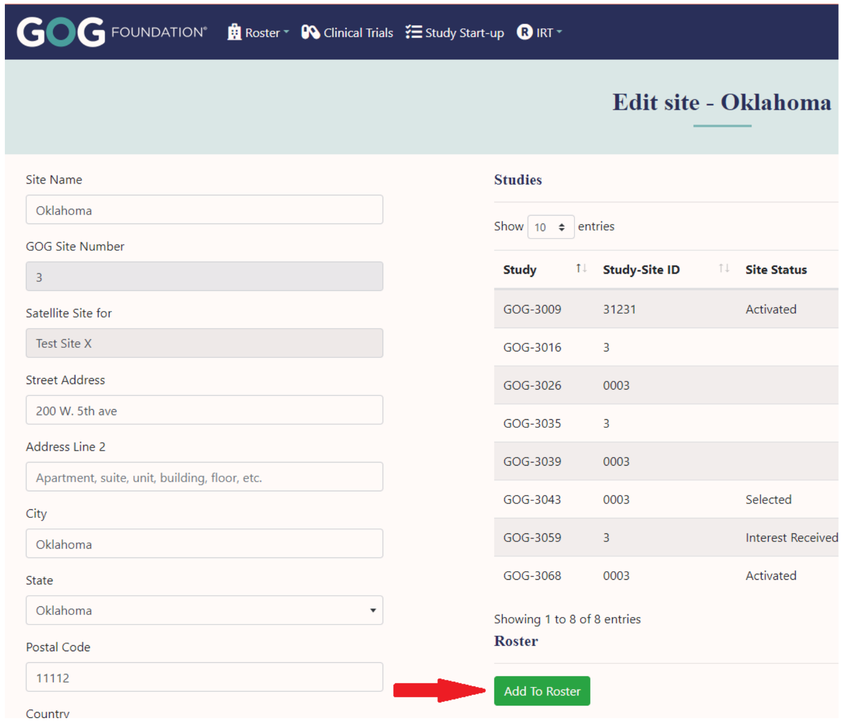
Adding Staff to Site Roster

You need to be designated as a person who can make changes to site roster.

Step 1: To add personnel to site roster, search by your site name or site institution number from the Site Roster screen, and then click site name. On the site profile screen, click “Edit Site”.



Step 4: On the edit site screen, click “Add to Roster” to add study personnel.



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Adding Staff to Site Roster

You need to be designated as a person who can make changes to site roster.

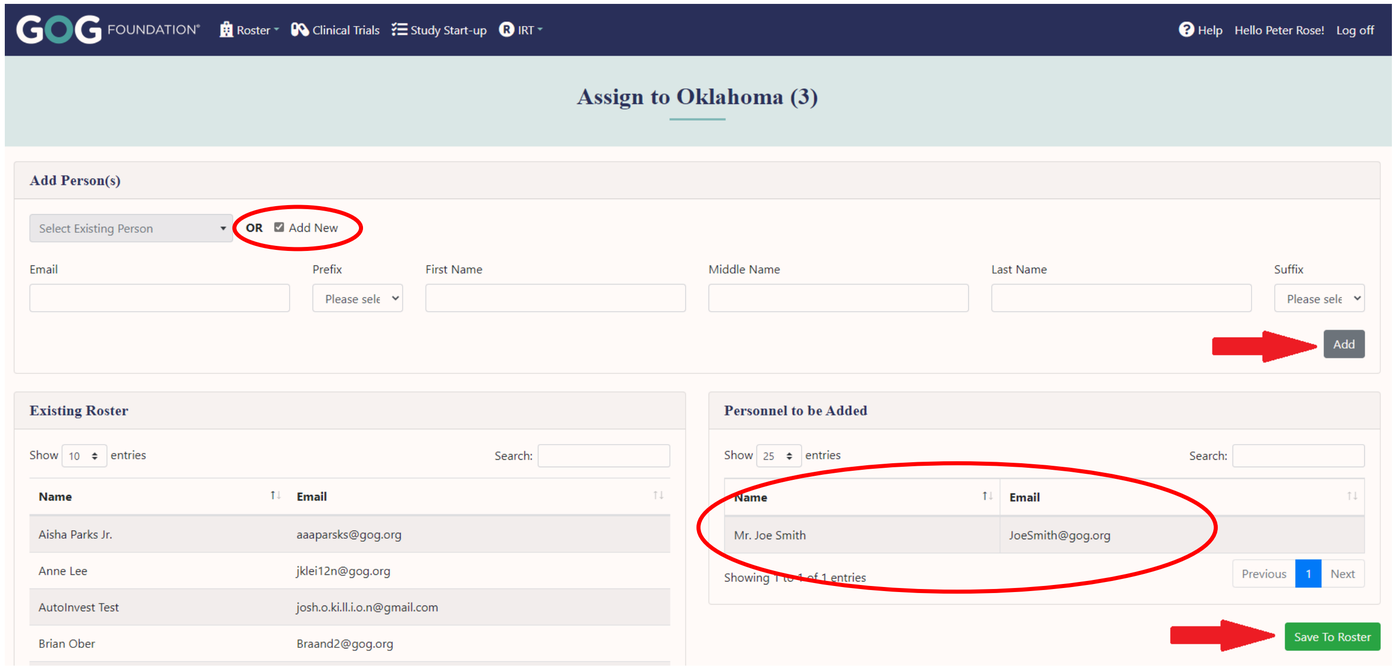
Step 6: To add a person, check the “Add New” box. Fields will appear to enter person details such as:

- Name, E-mail, Prefix (e.g., Dr., Mrs., etc.)

Step 7: Click “Add”. Person now shows up in the “Personnel to be Added” box. Repeat until all new personnel to be added are listed.

Step 8: Click “Save To Roster”. Person(s) are added to site roster.

- Validation checks are performed when adding staff to the roster to avoid duplicate entries and other errors.



All personnel will be added to GOG’s distribution list for study-specific communications

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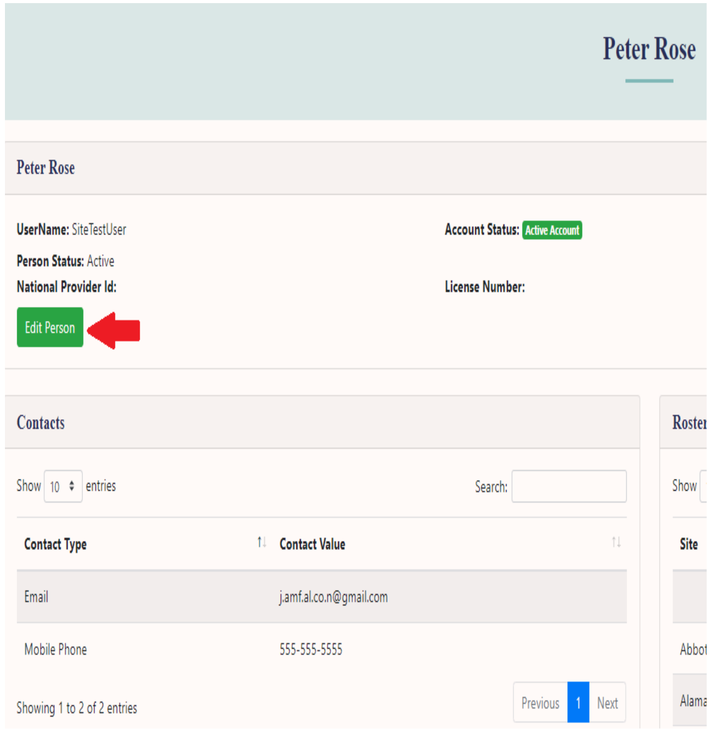
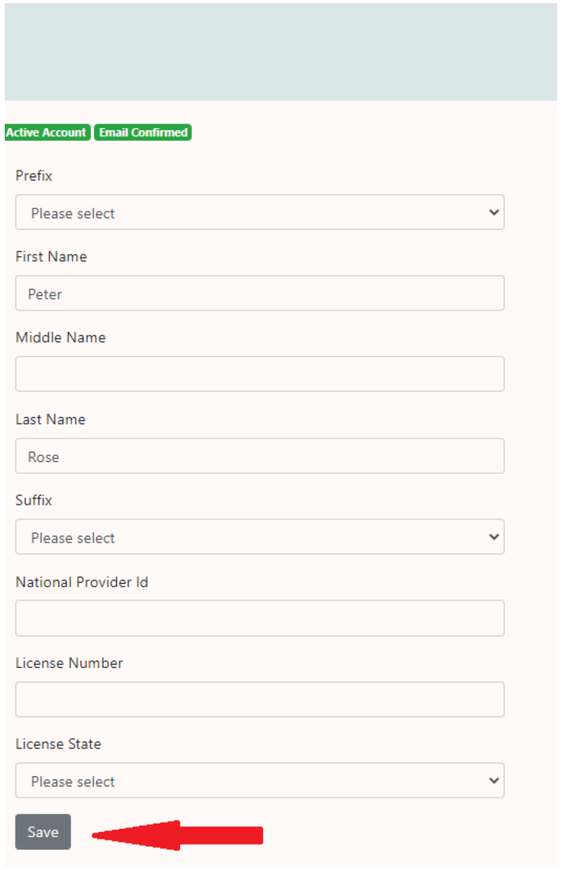
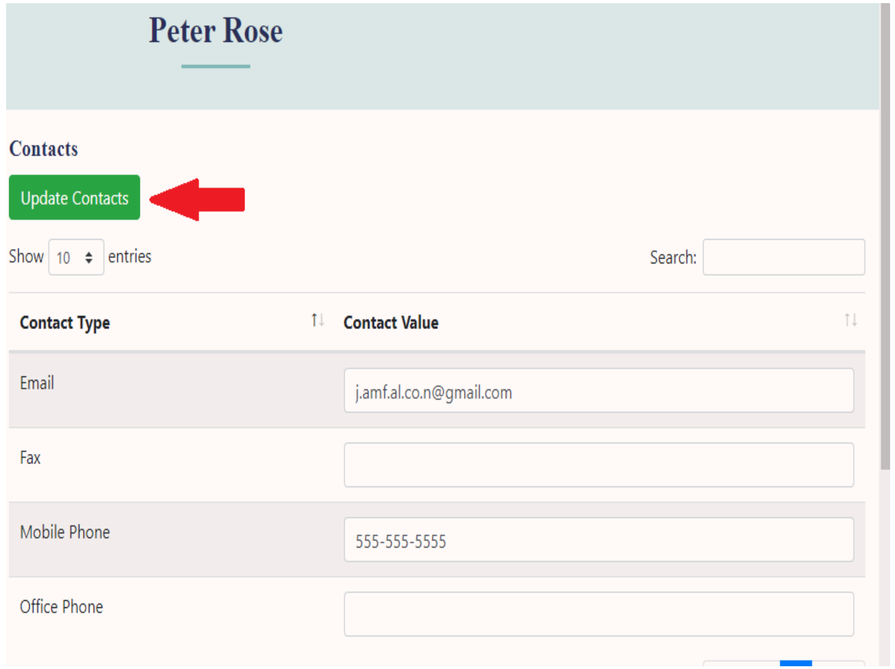
Managing Staff Information on Site Roster

Site Editors can modify any rostered persons details, and contact information

- **Step 1**: To edit the person, click “Edit Person” in the person profile.
- **Step 2**: The person’s edit screen appears where name, NPI number, license number, license state, e-mail, phone and mobile numbers can be added or changed.
  - Click the “Save” button to update the person’s details on the left-hand side of the screen (middle image).
  - After making changes to any Contact, click the “Update Contacts” button to save those changes (right-most image).







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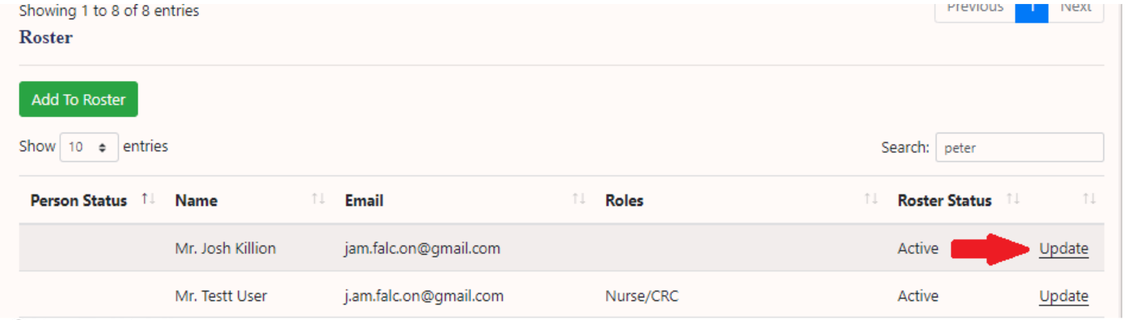
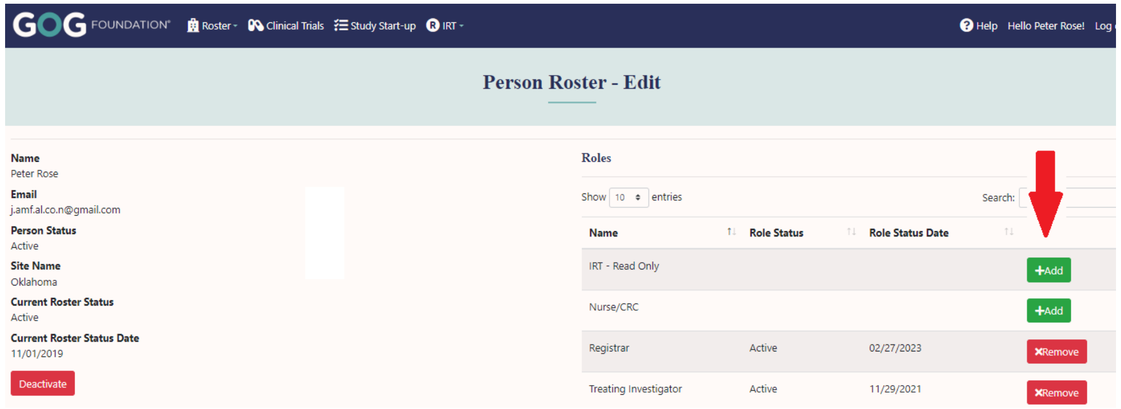
Assigning Staff Roles

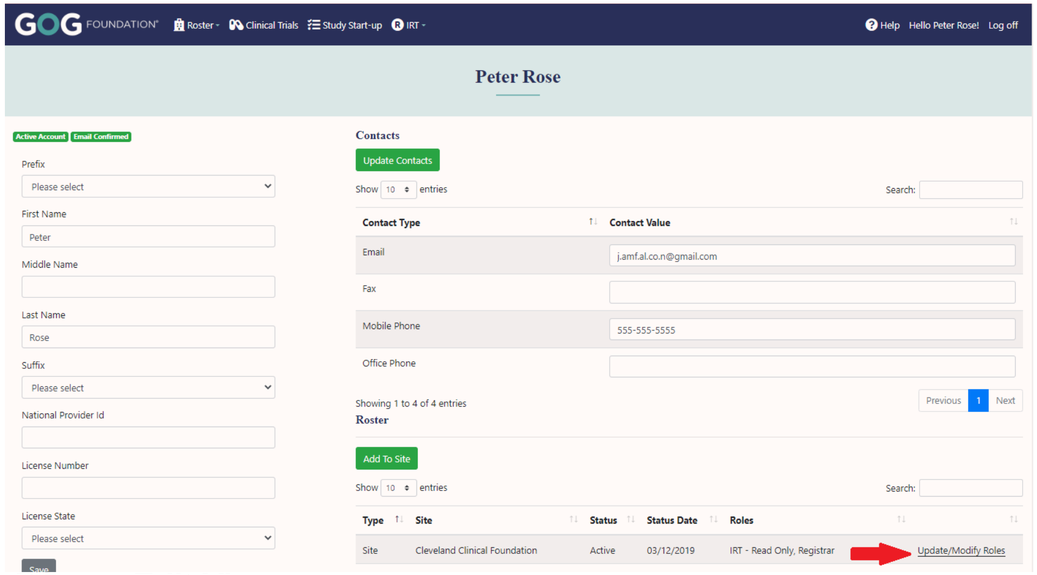
- **Step 1**: Starting from either the site or person edit page, click the “Update/Modify Roles” link in Roster section for the desired site/person.
  - If the person is active at more than one location, and roles need to be assigned, update each role at each respective site listed.

- **Step 2**: Once in the Person Roster edit screen, the editor can add or remove roles for that specific person. **Removing any roles will remove access to applicable systems.**



Site Edit View





Person Edit View

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Assigning Staff Roles

- Types of roles available to be assigned to appropriate personnel are in the table below.

Role	Description	Types of Personnel
Nurse/CRC	Access to EDC*	Investigators, Research Nurses, Study Coordinators, Data Coordinators
Registrar	Access to IRT to registration patients*	Research Nurses, Study Coordinators
Treating Investigator	Investigator treating patients	Physicians, PA-C

***For GOG Sponsored Trials**

Removing Staff from Site Roster

- **Step 1**: Starting from either the site or person edit page, click the “Update/Modify Roles” link in Roster section for the desired site/person.
  - If there is more than one site listed, it is important to recognize if the person is active or not at that specific site.
- **Step 2**: Once in the Person Roster edit screen, the editor will click “Deactivate” to make the person inactive at the site. **Deactivating the person will remove access to applicable systems, the GOG Partners Portal, and future GOG communications.**

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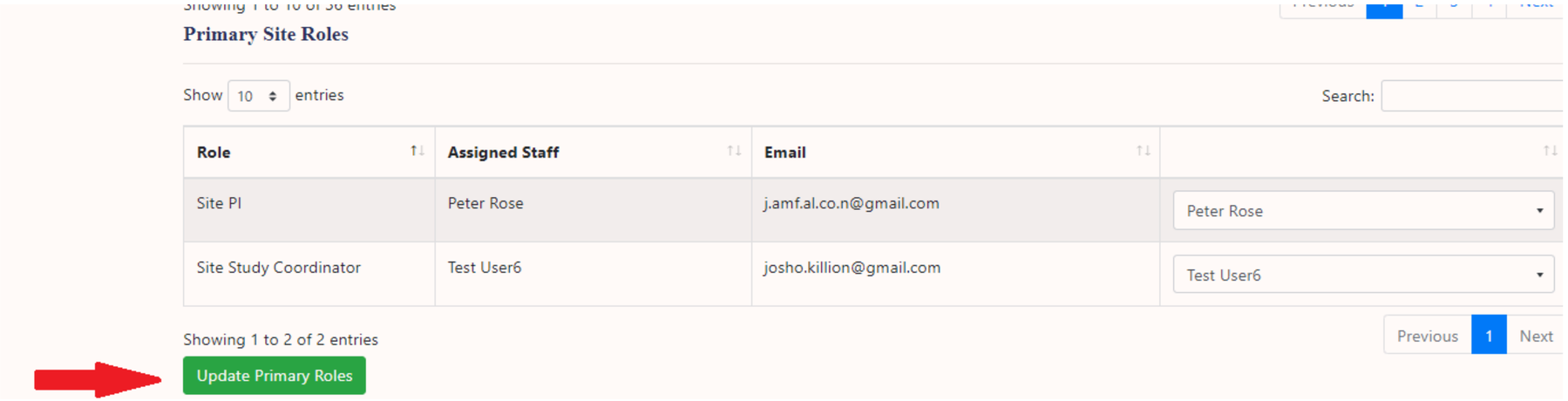
Assigning Primary Roles

To assign a primary role to a person, a person must already be rostered to the site.

- **Step 1**: On the site edit screen, scroll down to the Primary Roles section.
- **Step 2**: To assign a person to a primary role, click in the search list to the right and a drop down of rostered personnel will appear.
- **Step 3**: Select the name of the person associated with that primary role.
- **Step 4**: To save the updates to the primary role, click “Update Primary Roles”.



Primary Site Roles

- In an effort to streamline communications and to limit the redundancy of asking for the same contact multiple times at interest and feasibility, GOG is requesting a primary contact be assigned to a primary role. There will be one assignment per defined role.
- Starred (*) roles grant the assignee edit permissions for the respective site.
- Description of each of the primary roles are as follows:

Primary Role	Description
CDA Contact	Person contact responsible for facilitating the CDA for study documents to be sent for all GOG Partners trials.
CTA/Budget Contact	Person contact responsible for facilitating the site CTA/budget for all GOG Partners trials.
Feasibility Contact	Person contact for facilitating feasibility for selection of the trial for all GOG Partners trials.
Regulatory Contact*	Person contact for facilitating site start-up documents and documents throughout the life of the trial.
Site PI*	Principal Investigator of the Site.
Site Study Coordinator*	Person contact for activities essential to the conduct of the clinical trial at the site.

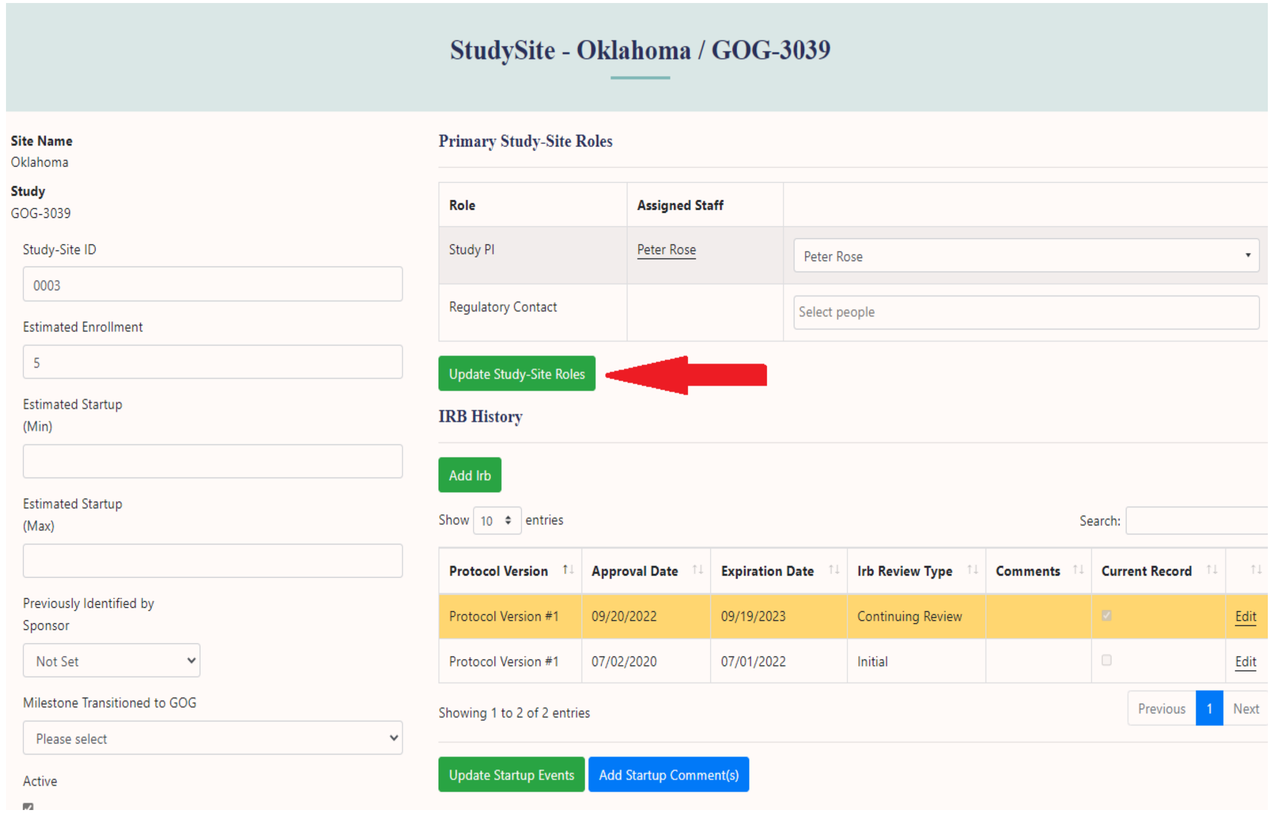
Study Role Updates

To assign/update a study role to a person, a person must already be rostered to the site.

- **Step 1**: On the Study-Site edit screen, locate the Primary Study-Site Roles section.
- **Step 2**: To assign a person to a role, click in the search list to the right and a drop down of rostered personnel will appear.

- **Step 3**: Select the name of the person associated with that role.
  - Some roles permit multiple selections, while others are limited to one (e.g., Study PI)

- **Step 4**: To save the updates to the primary role, click “Update Study-Site Roles”.



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Additional Notes

- Please contact GOGRegulatory@gog.org for any questions.
- The GOG Clinical Trials Management Team will be happy to set up a brief training session with your site should any assistance be needed.
- Thank you for your continued support.