

## Accessing and Maintaining Site Personnel Information in the DAIDS-ES

As a site coordinator, maintaining accurate contact information for your site staff is important to you. Being able to access and update that information through the DAIDS-ES is a valuable tool. This guideline is intended to provide you with some quick references for accessing information about your site and updating that information.

Retrieving your site's CRS Profile Report can be done through two avenues:

1. The [DAIDS Clinical Site Monitoring module](#) (CSM)
2. The [DAIDS Protocol Registration System](#) (DPRS)

Once you have accessed the information and identified the updates required, you can use the Site Enrollment Module in DAERS to provide those updates to DAIDS-ES Support and the Clinical Study Information Office (CSIO) for updating the system. We have included step-by-step instructions for modifying some of the information for people at your site directly through the DAIDS-ES in the [Modifying Personnel at My Site](#) section.

Let's begin by going through a step-by-step guide to access the CRS Profile Report through either the CSM module or the DPRS module.

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## Clinical Site Monitoring module

To access the CRS Profile Report in the Clinical Site Monitoring (CSM) module see the instructions below.

Once you have logged into the CSM module click on the “Reports” button to access the reports page.

To access the Clinical Research Site (CRS) Profile Report from the reports page simply click the List of Values (LoV) icon on the right side of the “Site Name” box.

Please note that if you type directly in the box it will **NOT** give you the opportunity to select for the CRS Profile Report.

The screenshot displays the DAIDS-ES Clinical Site Monitoring interface. The top navigation bar includes "Clinical Site Monitoring" and "DIVISION OF AIDS" on the left, and "DAIDS-ES | Help | Logoff" on the right. The main header shows "Site Visit Summary" and login information: "Last successful login: Apr 03, 2013 02:39 PM" and "No. of unsuccessful login attempts: 1". Below the header is a navigation menu with "Site Monitoring", "Document Library", and "Reports". A sidebar on the left is titled "Visit Reports" and contains "Site Visit Summary". The main content area is titled "My Sites:" and has a checked checkbox. Below this is a large text input field for "Site Name:" with a yellow arrow pointing to a small icon on its right side. Further down are fields for "Visit Type:" (a dropdown menu set to "Any"), "Visit Quarter:" (a text box containing "2Q 2013" with a small icon on its right), and "Visit Status:" (a dropdown menu set to "Any"). There are two main sections: "Site Visit Summary Report" and "Site Visit Documents". The "Site Visit Summary Report" section contains instructions: "To run the default report, click **Run Report**. Click [customize](#) to modify the report display fields." and "Select the report display type:  HTML  Excel" with a "Run Report" button below. The "Site Visit Documents" section contains instructions: "To experience faster report processing time, it is recommended to **narrow the search criteria** by **selecting specific sites and visit quarters** before clicking on the **View Site Visit Documents** button." with a "View Site Visit Documents" button below.

Once you click the LoV icon, you will get the following small screen tailored to your specific site:

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DAIDS-ES | Help | Logout

Clinical Site Monitoring  
DIVISION OF AIDS

Site Visit Summary

Last successful login: Apr 03, 2013 02:39 PM  
No. of unsuccessful login attempts: 1

Site Monitoring Document Library Reports

Visit Reports

Site Visit Summary

My Sites:

Site LOV

Filter by: Site ID

[Add more search criteria](#)

1 record(s) found

Select	Site ID	Site Name	Network / Non-Network	Site Type	Site Status	Site Monitoring Status	View Protocols at Site
<input type="checkbox"/>	<a href="#">30301</a>	Your site s name	ACTG,HPTN,IMPAACT,MTN	Clinical Research Site	Active	On-going	

To run the default report, click **Run Report**. Click [customize](#) to modify the report display fields.

Select the report display type:  HTML  Excel

[Site Visit Documents](#)

To experience faster report processing time, it is recommended to **narrow the search criteria** by selecting specific sites and visit quarters before clicking on the **View Site Visit Documents** button.

From here you may click on the site number to see your site's profile report. Also, you may click on the icon under the "View Protocols at Site" to see all the protocols ever associated to your site.

### DAIDS Protocol Registration System (DPRS)

To access the CRS Profile Report from the DPRS module:

Once you are logged into the DPRS module go to the Submissions button and select "New Submission" as shown below:

## Accessing and Maintaining Site Personnel Information in the DAIDS-ES

Protocol Registration  
DIVISION OF AIDS

Home

Last successful login: Apr 03  
No. of unsuccessful login attempts: 1

Submission Search Submissions Reports

New Submission  
Requested Materials  
Corrected Materials  
Disapproval Reversal

Receipt Number	Type	Site	Protocol No.	Submission Status	Days Remain	View
2013-041	Deregistration	40551	HPTN 057 - 2.0	Review in Progress	8	
2013-042	LOA Registration	40551	A5264/AMC067 - 1.0	Review in Progress	4	
2013-043	Updated IoR Form for existing IoR	40551	P1079 - 1.0	Review in Progress	15	
2013-055	Other Materials	40551	A5264/AMC067 - 1.0	Review in Progress	10	
2013-071	Amendment	40551	A5282 - 1.0	Pending Submission	-	

Type	Message	Start Date	Delete
Notification		3/8/2013 1:36:50 PM	
Alert		3/8/2013 1:36:49 PM	
Notification		3/8/2013 12:59:46 PM	

Privacy Notice Legal Disclaimer

Once selected and the “New Submission” page has loaded select the site you wish to investigate (it must be one of your sites) click on the icon with the magnifying glass in the far right towards the top of the page to access the CRS Profile report.

Protocol Registration  
DIVISION OF AIDS

New Submission

Last successful login: Apr 04, 2013 09:41 AM  
No. of unsuccessful login attempts: 0

Submission Search Submissions Reports

Packet Number: Packet Number will be generated upon saving this submission

Site & Protocol details  
To initiate a submission, select a site and protocol

\* Site: 31770 - Mv Site

\* Protocol No:  Select Version

To view LOA Versions, click the LOA Registration checkbox below

Select the Investigator of Record (IoR) below for the above protocol and site.

\* Select IoR:

Note: Before adding a new IoR, verify IoR name doesn't exist.  
Cannot find IoR, [click here](#) to add the IoR name.

Enter email addresses for additional contacts who need to receive notifications.

Additional Contacts:

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Please note that once on the CRS Profile Report the site will have access to all the hyperlinks to additional information.

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## Modifying Personnel at My Site

### Adverse Experience Reporting module

Originally this module was designed only to capture individuals who are either Submitters or Reporters in DAERS. Submitters and Reporters are still designated in this module; however, it may also be used to modify information for other individuals at your site as shown below.

In order to view or modify information pertaining to individuals at your sites in the DAIDS Adverse Experience Reporting module scroll over the “Person” button and select “New Request” as shown below:

The screenshot displays the DAIDS-ES Adverse Experience Reporting interface. At the top, the navigation bar includes 'EAE', 'Search', 'Person', 'EAE Notification Recipients', and 'RSC'. A yellow arrow points to the 'Person' button, which has a dropdown menu with 'New Request' and 'View Requests' options. Below the navigation bar, there are four main sections:

- EAE Report Status:** A table showing the status of reports:

Status	Count
<a href="#">Pending</a>	10
<a href="#">Ready for Final Review</a>	0
<a href="#">Submitted to RSC</a>	349
- Add/Modify Related Links:** A section for managing related links.
- Alerts:** A section for managing alerts. It includes a form with dropdowns for Site ID, Protocol ID, and Alert, and a table with columns: Site ID, EAE Number, Protocol ID, PIDAlert, Due Date, and Days Overdue. A message below the table reads: "No matching Alerts for EAE Reports were found".
- Unstable EAE Outcomes:** A section for providing updates on unstable outcomes. It includes a form with dropdowns for Site ID and Protocol ID, and a table with columns: EAE, Protocol ID, PID, Primary AE, and # of.

Once the “New Request” screen has loaded you will be able to edit information or add/inactivate individuals.

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The screenshot shows the DAIDS-ES interface. At the top left is the 'Adverse Experience Reporting DIVISION OF AIDS' logo. The page title is 'New Request'. On the top right, it shows 'Last successful login: Apr 04, 2013 10:33 AM' and 'No. of unsuccessful login attempts: 0'. A navigation bar includes 'EAE', 'Search', 'Person', 'EAE Notification Recipients', and 'RSC'. Below the navigation bar, there are instructions: 'Select the Site ID and click "Search" to view all the persons who are associated to the Site. To view a list of all site staff who currently have access to the DAIDS Adverse Experience Reporting System (DAERS), click "User Information Report". To add a new person, click "Add New Person". To edit a person's information (name, degree, contact information, role in DAERS and protocols), click "Edit". To report a person no longer requiring access to DAERS, click "Inactivate".' A 'Site ID' dropdown menu is set to '31770 - My Site'. Below it are 'Search' and 'Clear' buttons. Further down are 'Add New Person' and 'User Information Report' buttons. A table lists personnel for Site ID 31770:

Site ID	Person Name ▲	Role (Title)	E-mail Address	Association Status	Action
31770	Komal Patel	Investigator		Active	<a href="#">Edit</a>
31770	Jack Smith	CRS Coordinator	JSmith@tech-res.com	Active	<a href="#">Edit</a> <a href="#">Inactivate</a>
31770	Matthew D Riggs	CRS Leader	mriggs@tech-res.com11	Active	<a href="#">Edit</a> <a href="#">Inactivate</a>
31770	Vanessa Mitchell	Investigator		Active	<a href="#">Edit</a> <a href="#">Inactivate</a>

Below the table is an 'Export to Excel' button. At the bottom of the page, there are links for 'Privacy Notice' and 'Legal Disclaimer', and three logos: the Department of Health and Human Services, the Division of AIDS, and the National Institutes of Health.

Please note that your site may contain multiple pages, only 10 people are included on each page.

To edit information simply select the edit button on the right associated with the person you wish to edit and the following screen will load.

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The screenshot shows the 'Person Information' form in the DAIDS-ES system. The header includes the 'Adverse Experience Reporting DIVISION OF AIDS' logo, a 'Person Information' tab, and a 'Logoff' link. The user's last successful login is noted as 'Apr 04, 2013 10:33 AM' with 'No. of unsuccessful login attempts: 0'. The navigation bar contains 'EAE', 'Search', 'Person', 'EAE Notification Recipients', and 'RSC'. The form header displays 'Site ID: 31770', 'Person Name: Komal Patel', and 'Request ID: 7178'. The main instruction reads: 'Enter the name and the contact information of the person associated with your Site.' The form fields include: 'Prefix: Please Select an Option' (dropdown), '\*First (Given) Name: Komal' (text), 'Middle Name:' (text), '\*Last (Family) Name: Patel' (text), 'Degree:' (text), 'Title (position):' (text), '\*Association Role with the Site: Investigator' (dropdown), '\*Phone 1: 1-301-555-1212' (text) with 'Ext.:' (text), 'Phone 2:' (text) with 'Ext.:' (text), '\*E-mail 1: kp@demoemail.com' (text), 'E-mail 2:' (text), and 'Comments:' (text area). At the bottom are buttons for '<Previous', 'Restore', and 'Save & Next>'. The footer contains 'Privacy Notice' and 'Legal Disclaimer' links, along with three logos.

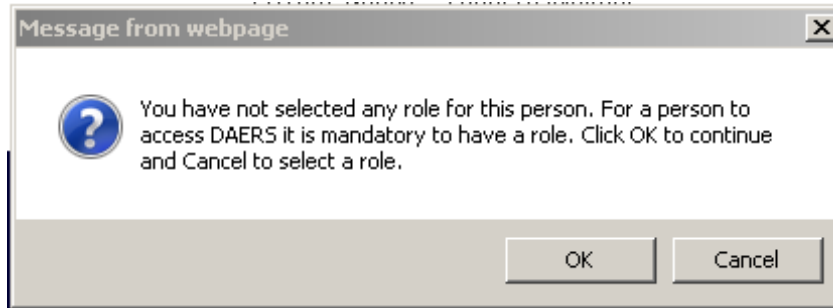
Make all necessary changes and click the “Save & Next” button.

The screenshot shows the 'DAERS Roles' selection screen. The header includes the 'Adverse Experience Reporting DIVISION OF AIDS' logo, a 'Person Information' tab, and a 'Logoff' link. The user's last successful login is noted as 'Apr 04, 2013 10:33 AM' with 'No. of unsuccessful login attempts: 0'. The navigation bar contains 'EAE', 'Search', 'Person', 'EAE Notification Recipients', and 'RSC'. The form header displays 'Site ID: 30301', 'Person Name: Frank Tauro', and 'Request ID: 5328'. The main instruction reads: 'Select the role the person will have in DAERS. If there are no changes to the existing information, click “Save & Next>”. Note: Unselecting a role will revoke the corresponding access in DAERS.' The form contains a table with two columns: 'Select' and 'DAERS Roles'. The table has two rows: the first row has an unchecked checkbox and the text 'Enter EAE Reports (Reporter)'; the second row has an unchecked checkbox and the text 'Enter, Review and Submit EAE Reports (Submitter)'. At the bottom are buttons for '<Previous', 'Restore', and 'Save & Next>'. The footer contains 'Privacy Notice' and 'Legal Disclaimer' links, along with three logos.

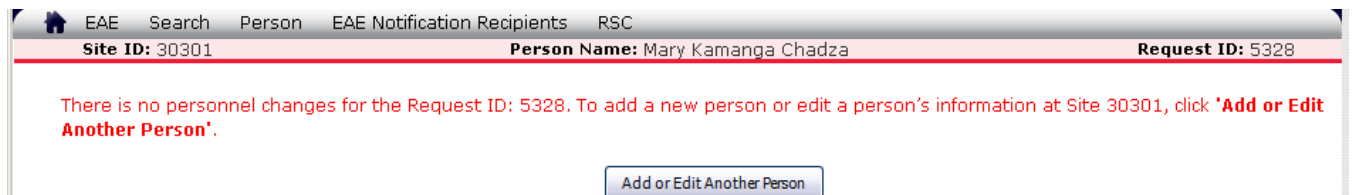
The next screen will ask you to select a role as either Reporter or Submitter. If the person being modified holds one of these roles pertaining to the DAERS display please select it here and click the “Save & Next” button. If not, simply click the “Save & Next” **without choosing a DAERS role**. The following message will appear:



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Simply click “OK” to continue, the following screen will appear with different report and site IDs:



Click the “Add or Edit Another Person” button to return to the “New Request” screen and continue to edit people as appropriate.

To see the information you have updated select the request ID number on the “New Request” screen:

Select the Site ID and click “Search” to view all the persons who are associated to the Site.  
To view a list of all site staff who currently have access to the DAIDS Adverse Experience Reporting System (DAERS), click “User Information Report”.

To add a new person, click “Add New Person”.  
To edit a person’s information (name, degree, contact information, role in DAERS and protocols), click “Edit”.  
To report a person no longer requiring access to DAERS, click “Inactivate”.

Site ID:

**! - You have a request ID: 5328 which is in draft**

Site ID	Person Name ▲	Role (Title)	E-mail Address	Association Status	Action
! 31770	Komal Patel	Investigator		Active	<input type="button" value="Edit"/>
31770	Jack Smith	CRS Coordinator	JSmith@tech-res.com	Active	<input type="button" value="Edit"/> <input type="button" value="Inactivate"/>
31770	Matthew D Riggs	CRS Leader	mriggs@tech-res.com11	Active	<input type="button" value="Edit"/> <input type="button" value="Inactivate"/>
31770	Vanessa Mitchell	Investigator		Active	<input type="button" value="Edit"/> <input type="button" value="Inactivate"/>

Please note that names with an exclamation sign to the left have been edited.

## **Accessing and Maintaining Site Personnel Information in the DAIDS-ES**

Also, to access a report telling you who at your site is a Reporter or Submitter and what studies they are currently assigned to in the system simply click on the “User Information Report” button on the “New Request” screen. This will automatically open a Microsoft Excel file listing everyone at your site and their DAERS Role, if they have one, their assignments, and their DAERS training date.