

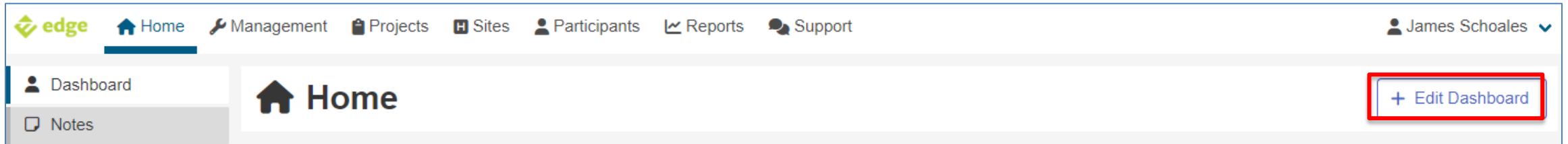


3CTN Reporting Portal User Training

2023

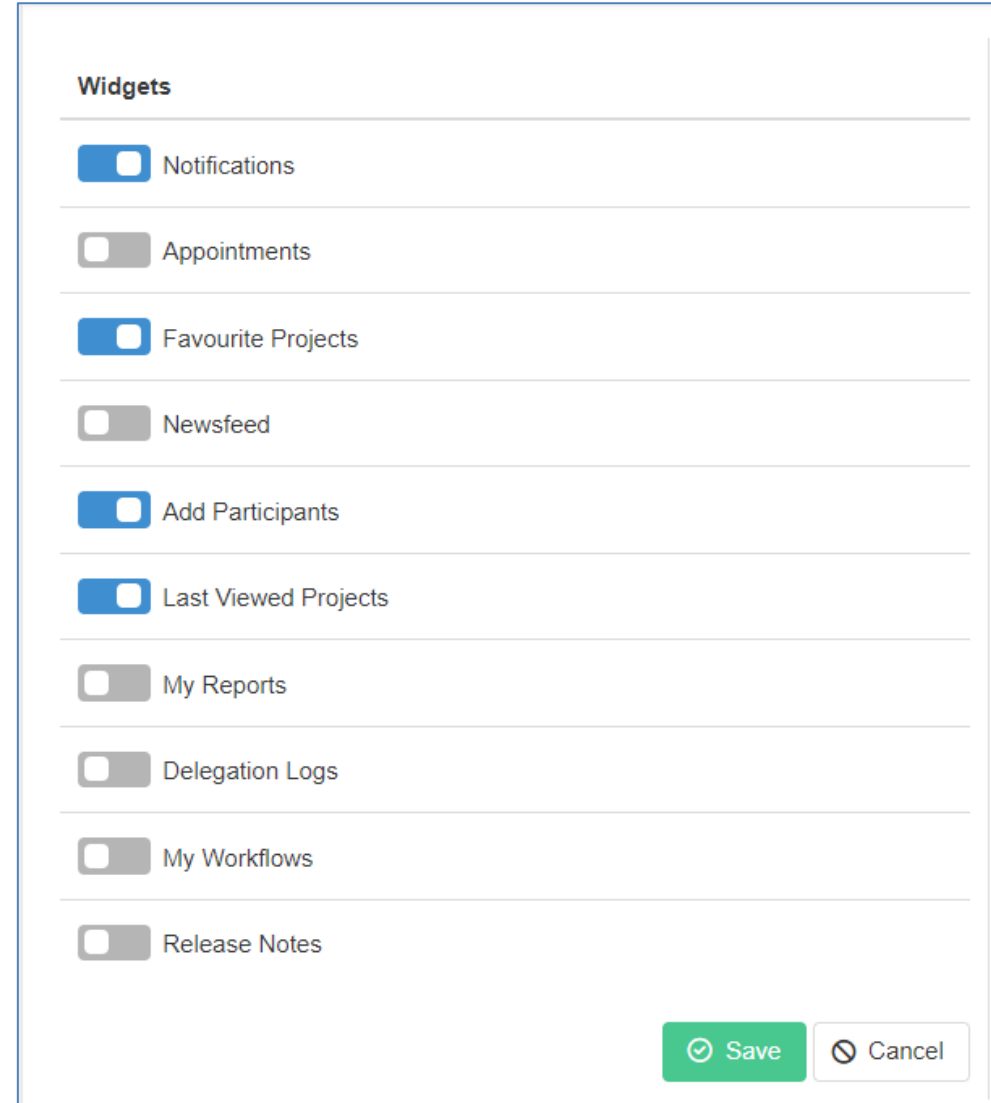
Setting Up Your Dashboard

When you first login to V3 your dashboard will be blank. In order to add widgets to your dashboard click **Edit Dashboard**.



Setting Up Your Dashboard

- You can click on the sliders to add certain widgets to your dashboard.
- For reporting portal users we recommend the selected widgets in the image to the right.



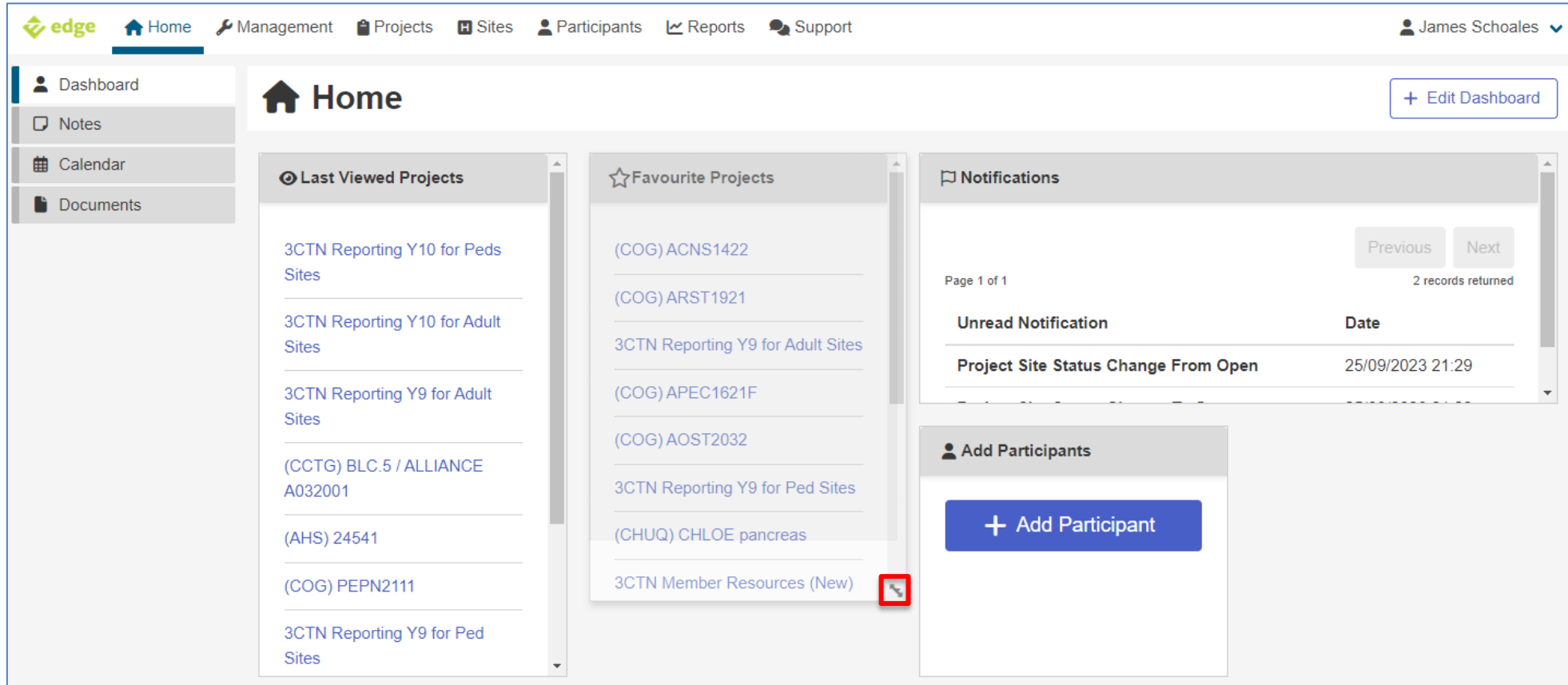
The image shows a user interface for selecting dashboard widgets. It features a list of ten widgets, each with a toggle switch. The first four widgets (Notifications, Appointments, Favourite Projects, and Newsfeed) have their toggle switches turned on, indicated by a blue bar. The remaining six widgets (Add Participants, Last Viewed Projects, My Reports, Delegation Logs, My Workflows, and Release Notes) have their toggle switches turned off, indicated by a grey bar. At the bottom right of the interface are two buttons: a green 'Save' button and a grey 'Cancel' button.

Widget	Selected
Notifications	Yes
Appointments	No
Favourite Projects	Yes
Newsfeed	No
Add Participants	No
Last Viewed Projects	Yes
My Reports	No
Delegation Logs	No
My Workflows	No
Release Notes	No

Save Cancel

Setting Up Your Dashboard

- Once you click save you can resize and reorganize the widgets.



The screenshot displays the 'edge' dashboard interface. The top navigation bar includes links for Home, Management, Projects, Sites, Participants, Reports, and Support, along with a user profile for James Schoales. A left sidebar contains links for Dashboard, Notes, Calendar, and Documents. The main content area is titled 'Home' and features an 'Edit Dashboard' button. It contains several widgets: 'Last Viewed Projects' with a list of project reports; 'Favourite Projects' with a list of project names and reports; 'Notifications' showing a table of unread notifications; and 'Add Participants' with a '+ Add Participant' button. A red box highlights a small icon in the bottom right corner of the 'Favourite Projects' widget, which is used to save the dashboard layout.

Unread Notification	Date
Project Site Status Change From Open	25/09/2023 21:29

Setting Up Your User Profile


Options Under “My Profile”

- Add default project and project site roles
- Change Password
- Edit Notifications

Options Under “Management> Users”

- Change Username
- By default, it is your email. If too long, you can change into a short username

Edit User Profile

 [Home](#) [Management](#) [Projects](#) [Sites](#) [Participants](#) [Reports](#) [Support](#) James Schoales

Profile

Documents

Login

Training


Qualifications

Notifications


Forms

Delegation Logs

My Teams

 Personal Details

Edit Signature




Full Name

Mr James Schoales

Gender


Male

 Contact Details


Edit

Email

James.Schoales@oicr.on.ca

 Address

Edit

 Professional Details

Edit


Organisation

3CTN Coordinating Centre

edge Home Management Projects Sites Participants Reports Support James Schoales

Profile Documents Login Training Qualifications **Notifications** Forms

Notifications


 [Edit Notifications](#)

1 2 3 4 5 Previous Next

Page 1 of 31 308 records returned

No notification selected



Notification	Date ↓	Flagged	Select
Project Organisation Access	22/09/2023		<input type="checkbox"/>




edge Home Management Projects Sites Participants Reports Support James Schoales

Profile Documents Login Training Qualifications **Notifications** Forms Delegation Logs My Teams

Notification Settings

Notification	Description	Receive Internal Notification	Receive Email Notification
		<input type="checkbox"/> Select All	<input type="checkbox"/> Select All
Delegation Log PI Approval Required	When I am a PI and my approval is required for a change on a delegation log	<input checked="" type="checkbox"/> 	<input type="checkbox"/> 
Delegation Log User Approval Required	When my approval is required for a change related to me on a delegation log	<input type="checkbox"/>	<input type="checkbox"/>
Delegation Log User Deleted	When I am deleted from a delegation log	<input checked="" type="checkbox"/>	<input type="checkbox"/>

 [Home](#) [Management](#) [Projects](#) [Sites](#) [Participants](#) [Reports](#) [Support](#)

James Schoales

Support

KnowledgeBase

Videos

Release Notes

KnowledgeBase Home / 1 - Getting Started

1.1 - Account Set Up

How to manage your EDGE account and gain access

- 1101 - About EDGE
- 1102 - How to Activate an EDGE Account
- 1103 - How to Log In and Out of EDGE Securely
- 1104 - Password Criteria
- 1105 - Forgotten Your Password?
- 1106 - How to Reset a User's Password

1.2 - Your EDGE Profile

Managing and updating your information in EDGE

- 1201 - How to Update My Profile
- 1202 - How to Update Documents in My Profile
- 1203 - How to Edit Your Login Details
- 1204 - How to Update Training in My Profile
- 1205 - How to Update Qualifications in My Profile
- 1206 - How to Update Notifications in My Profile
- 1207 - How to Update Forms in My Profile
- 1208 - Delegation Logs
- 1209 - My Teams

1.3 - Navigating EDGE

Learn how to move around the system with an overview of the system functions and where to get help and support

- 1300 - The EDGE Dashboard
- 1301 - Navigating the Homescreen
- 1302 - The EDGE Environments
- 1303 - Notifications
- 1304 - The Support Tab

Trial Navigation

Different levels of data

Why different levels of data?

- CTMS design allows for sharing and collaboration
- Shared (project level) records containing common data can save time for collaborating sites/groups
- Establishing data levels ensures only desired elements are shared without compromising security and privacy

System Data Levels

Site

- Administrative data not limited to a given project/trial

Project

- General project information available to all sites and research groups

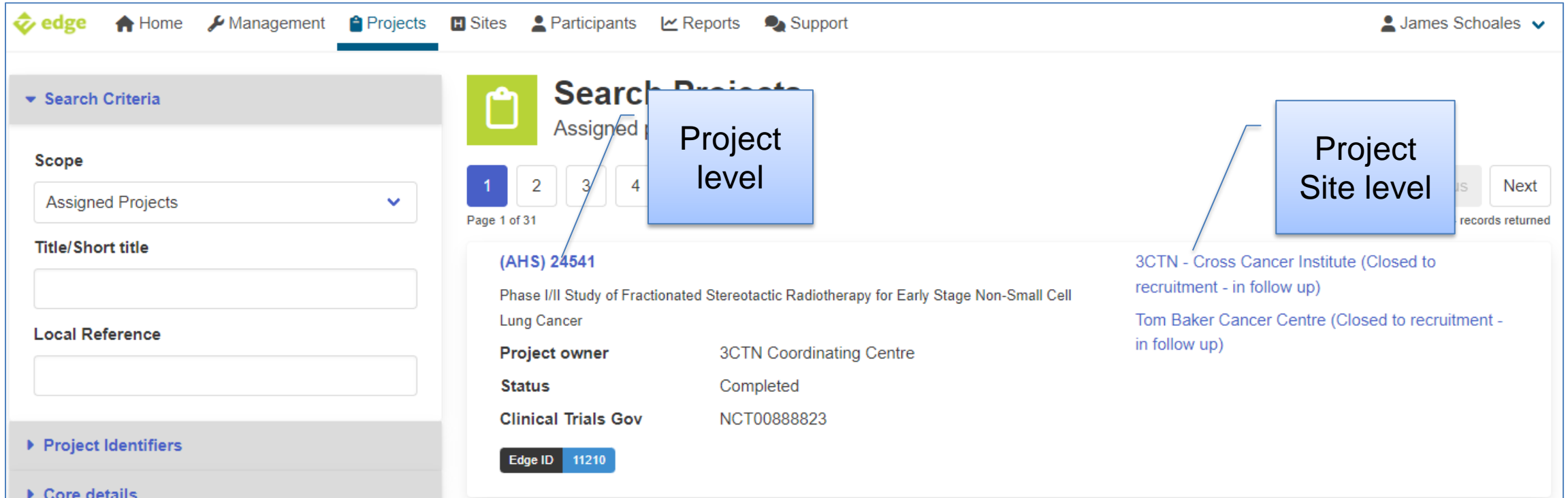
Project Site

- Site/Group-specific data related to a given project/trial

Participant Level

- Participant level data

Data Levels – example



The screenshot displays the 'edge' system interface. The top navigation bar includes links for Home, Management, Projects (active), Sites, Participants, Reports, and Support. The user 'James Schoales' is logged in. On the left, the 'Search Criteria' panel shows filters for Scope (Assigned Projects), Title/Short title, and Local Reference. The main content area shows a search for 'Assigned Projects' with a list of results. The first result is '(AHS) 24541', a Phase I/II Study of Fractionated Stereotactic Radiotherapy for Early Stage Non-Small Cell Lung Cancer. This result is annotated with a blue box labeled 'Project level'. The second result is '3CTN - Cross Cancer Institute (Closed to recruitment - in follow up)', which is annotated with a blue box labeled 'Project Site level'. The interface also shows pagination (Page 1 of 31) and a table of project details.

Project owner	Status	Clinical Trials Gov
3CTN Coordinating Centre	Completed	NCT00888823

Edge ID 11210

Data Levels – Project Site Level

↑ Sites

i Overview

Staff

Documents

Forms

Workflows

Notes

Finance

Collaborators

Metrics & Clocks

Timeline


Delegation Log

Participants

Import Participants

Statistics

Settings



(BCC) BEV-DOSE
 BC Cancer – Abbotsford

i Overview

☐ Audit Mode

Core Detail

Approval


Site Owner	Canadian Cancer Clinical Trials Network (CCCTN)	Approval process	Site Activation
Site Parent	BC Cancer	REB Submission Date	03/06/2023
Project Site Status	Open to recruitment (26/07/2023)	Date of REB Approval	24/09/2023
Site Type		Date site specific information	
Project Site Number		Capacity & capability assessment required?	No
Qualified In		Date site invited by sponsor	
Target Recruitment		Date site selected by sponsor	
Actual Recruitment	4	Date site confirmed by sponsor	
Participant Data Collection Plan	Canada	Date site confirmed participation	03/04/2023
Participant Identifier Type	Local Number	Non-confirmation Status	

Click on sites to navigate to your participant level

View and Add Trials

Exiting and new trials

View Open Recruiting Portfolio Trials


[Home](#)
[Management](#)
[Projects](#)
[Sites](#)
[Participants](#)
[Reports](#)
[Support](#)
James Schoales

Search Criteria

Scope

All Projects

Title/Short title

Local Reference

Project Identifiers

Core details

Project type

☐ Academic non-portfolio
☒ Academic portfolio
☐ Commercial non-portfolio
☐ Commercial portfolio

Project Status

☐ Closed - COVID-19
☐ Destroyed
☐ Follow up on hold - COVID-19
☐ Project setup suspended - COVID-19
☐ Recruitment on hold - COVID-19
☐ Concept
☐ Development

Search Projects

All projects

1

2

Page 1 of 2

Previous

Next

32 records returned

(AHS) 27/ MANTICORE

BC - Vancouver (Open to recruitment)

CancerCare Manitoba - Adults (Project site in setup)

A Prospective Study to See if Cardiac Effects of Herceptin Can be Prevented With Standard Heart Medications

Project owner

Canadian Cancer Clinical Trials Network (3CTN)

Status

Closed to recruitment - in follow up

Local reference

(AHS) 27/ MANTICORE

Clinical Trials Gov

NCT01016886

Protocol ID

Edge ID 6937

(BB) Another Test

Another Test

Project owner

Hamilton Health Sciences, Juravinski Cancer Centre

Status

Open to recruitment

Clinical Trials Gov

12345678

Edge ID 6943

(BCC) BEV-DOSE

BC - Vancouver (Open to recruitment)

BC Cancer – Abbotsford (Open to recruitment)

A Comparison of 2 Standard Doses of Bevacizumab in Combination With Chemotherapy in Epithelial Ovarian Cancer - a Pragmatic Trial

Project owner

Canadian Cancer Clinical Trials Network (3CTN)

Status

Open to recruitment

Clinical Trials Gov

NCT04787289

Protocol ID

BEV-DOSE

ALL(Global) Projects – Search & Add

- To add a new/missing trial, you can search by selecting **All Projects** from the **Scope** dropdown
 - Once found, request involvement
- Once you have access to/added the project:
 - Add your **project site**
 - Add yourself to the project & project site

Trial Performance Data Entry

Reporting new Portfolio trial involvement

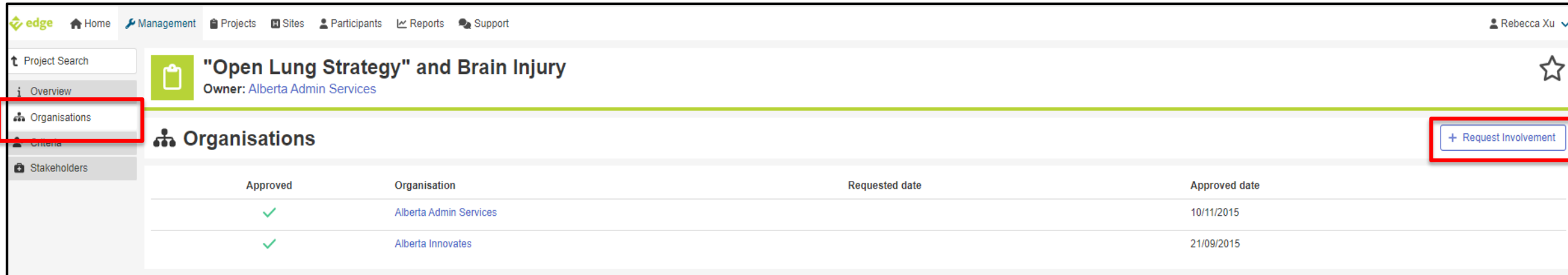


Adding a Project to your Organization in EDGE

- Search global projects for your desired Trial
- If found **request involvement**, notification email will be sent from the system (if you set it up).
- If not found,
 - For portal users, complete the 3CTN Portfolio application form and submit to info@3CTN.ca
 - For current EDGE site, use the “online 3CTN Portfolio application” project attributes
- Once you have added or have been a granted access to the project, you will then need to **add your staff and project site** to the project.

Requesting involvement

- If there is an existing project on EDGE and you do not have access, you can navigate to the **Organization tab** and click **Request Involvement**

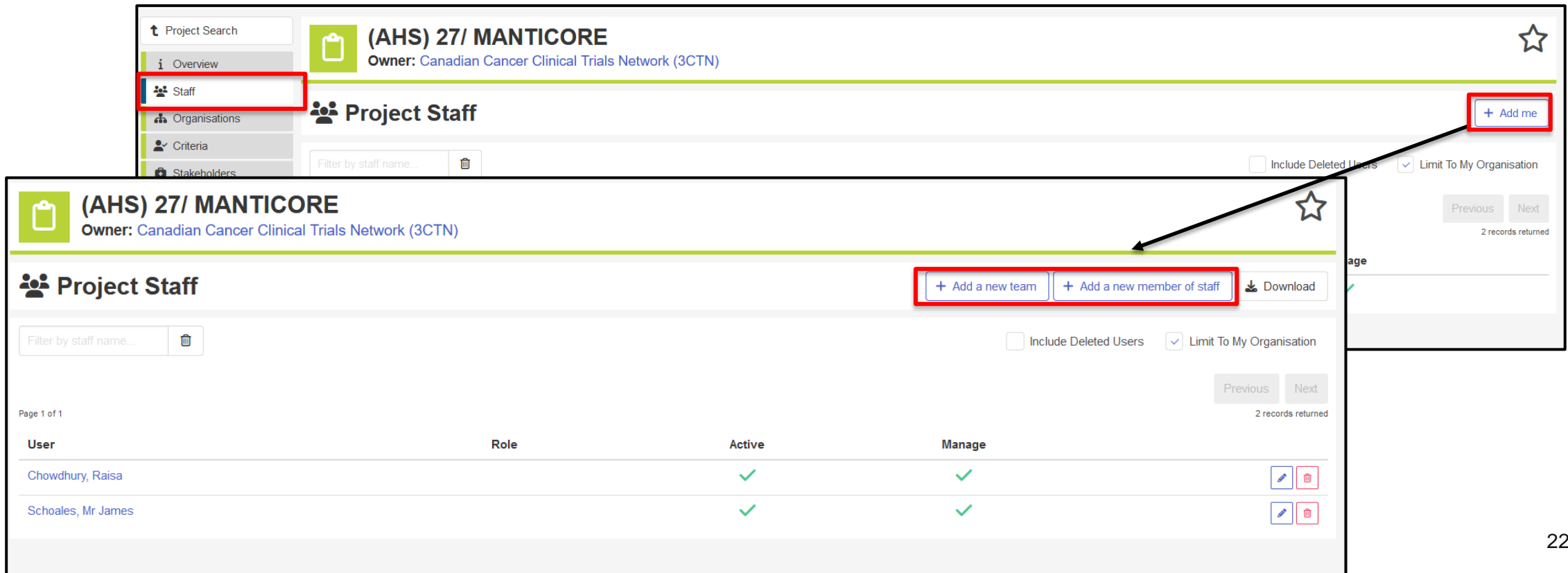


The screenshot shows the EDGE system interface. The top navigation bar includes links for Home, Management, Projects, Sites, Participants, Reports, and Support. The user is logged in as Rebecca Xu. The main content area displays the project details for "Open Lung Strategy" and Brain Injury, owned by Alberta Admin Services. The left sidebar shows the navigation menu with options: Project Search, Overview, Organisations (highlighted with a red box), Criteria, and Stakeholders. The main content area shows the "Organisations" tab with a table listing approved organizations. A red box highlights the "+ Request Involvement" button in the top right corner of the table area.

Approved	Organisation	Requested date	Approved date
✓	Alberta Admin Services		10/11/2015
✓	Alberta Innovates		21/09/2015

Add users to project

- Once the request is approved, you will need to add yourself and other users at the project level (green banner).
- Select the **STAFF** tab at the Project level (green banner) and click **ADD ME**. To add other users, **ADD A NEW TEAM** or **ADD A NEW MEMBER OF STAFF**.
- Click the **Manage** option (if applicable). You can also select a role from a drop-down list if desired.



(AHS) 27/ MANTICORE
Owner: Canadian Cancer Clinical Trials Network (3CTN)

Project Staff

Filter by staff name...

☐ Include Deleted Users ☒ Limit To My Organisation

Previous Next
2 records returned

User	Role	Active	Manage
Chowdhury, Raisa		✓	✓
Schoales, Mr James		✓	✓

Page 1 of 1

Previous Next
2 records returned

Adding a Site to a Project

After receiving access to the trial and being added as staff at the project level you will need to add your project site.

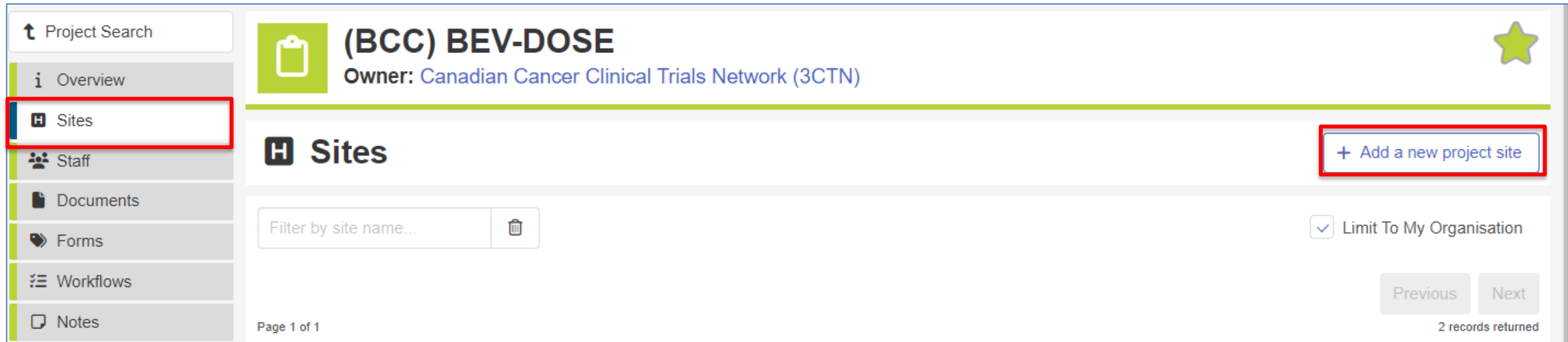
Steps

- Go to the project level (green banner) of desired trial
- Click on the “**Sites**” tab from the left navigation bar
- Click “**Add Project Site**”
- Choose your site from the “**select site**” window
- Fill in relevant data and click “**save**”

Note: To be able to add a site, your organization needs to be involved in the trial and you need to be added as staff to the trial with “**manage**” access.

Adding project site

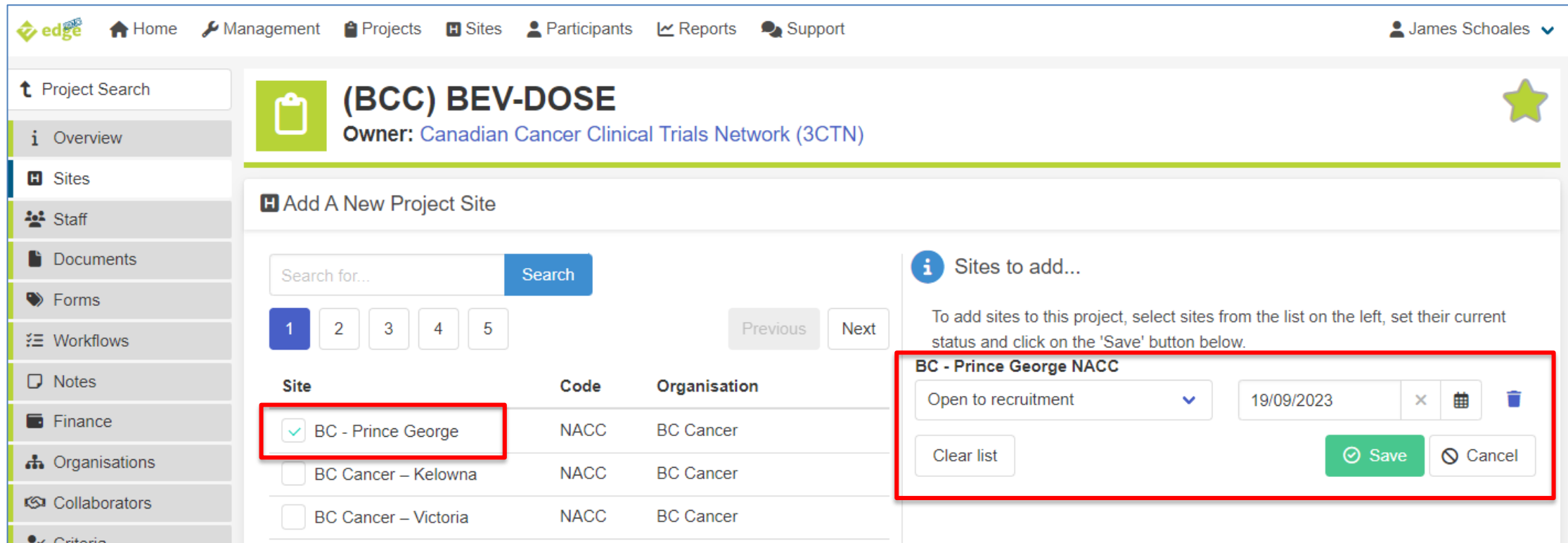
1. Go to the project level (green banner) of desired trial
2. Click on the “**Sites**” tab from the left navigation bar
3. Click “**Add a new project site**”



The screenshot displays the user interface for the (BCC) BEV-DOSE project. On the left, a navigation bar contains several tabs: 'Overview', 'Sites', 'Staff', 'Documents', 'Forms', 'Workflows', and 'Notes'. The 'Sites' tab is highlighted with a red box. The main content area features a green header with the project name '(BCC) BEV-DOSE' and the owner 'Canadian Cancer Clinical Trials Network (3CTN)'. Below the header, the 'Sites' section is visible, including a search filter 'Filter by site name...', a checkbox for 'Limit To My Organisation', and a button '+ Add a new project site' which is also highlighted with a red box. At the bottom right, there are 'Previous' and 'Next' buttons and a status '2 records returned'.

Adding a project site

4. Choose your site from the list or search
5. Fill in relevant data and click “**save**”



The screenshot shows the 'Add A New Project Site' interface for the project '(BCC) BEV-DOSE'. The interface includes a sidebar with navigation options like Project Search, Overview, Sites, Staff, Documents, Forms, Workflows, Notes, Finance, Organisations, Collaborators, and Criteria. The main content area has a search bar and a table of sites. The 'BC - Prince George' site is selected and highlighted with a red box. To the right, a 'Sites to add...' panel shows the selected site's status as 'Open to recruitment' and the date '19/09/2023'. The 'Save' button is highlighted with a red box.

edge Home Management Projects Sites Participants Reports Support James Schoales

Project Search

Overview

Sites

Staff

Documents

Forms

Workflows

Notes

Finance

Organisations

Collaborators

Criteria

(BCC) BEV-DOSE
Owner: Canadian Cancer Clinical Trials Network (3CTN)

Add A New Project Site

Search for... Search

1 2 3 4 5 Previous Next

Site	Code	Organisation
<input checked="" type="checkbox"/> BC - Prince George	NACC	BC Cancer
<input type="checkbox"/> BC Cancer – Kelowna	NACC	BC Cancer
<input type="checkbox"/> BC Cancer – Victoria	NACC	BC Cancer

Sites to add...

To add sites to this project, select sites from the list on the left, set their current status and click on the 'Save' button below.

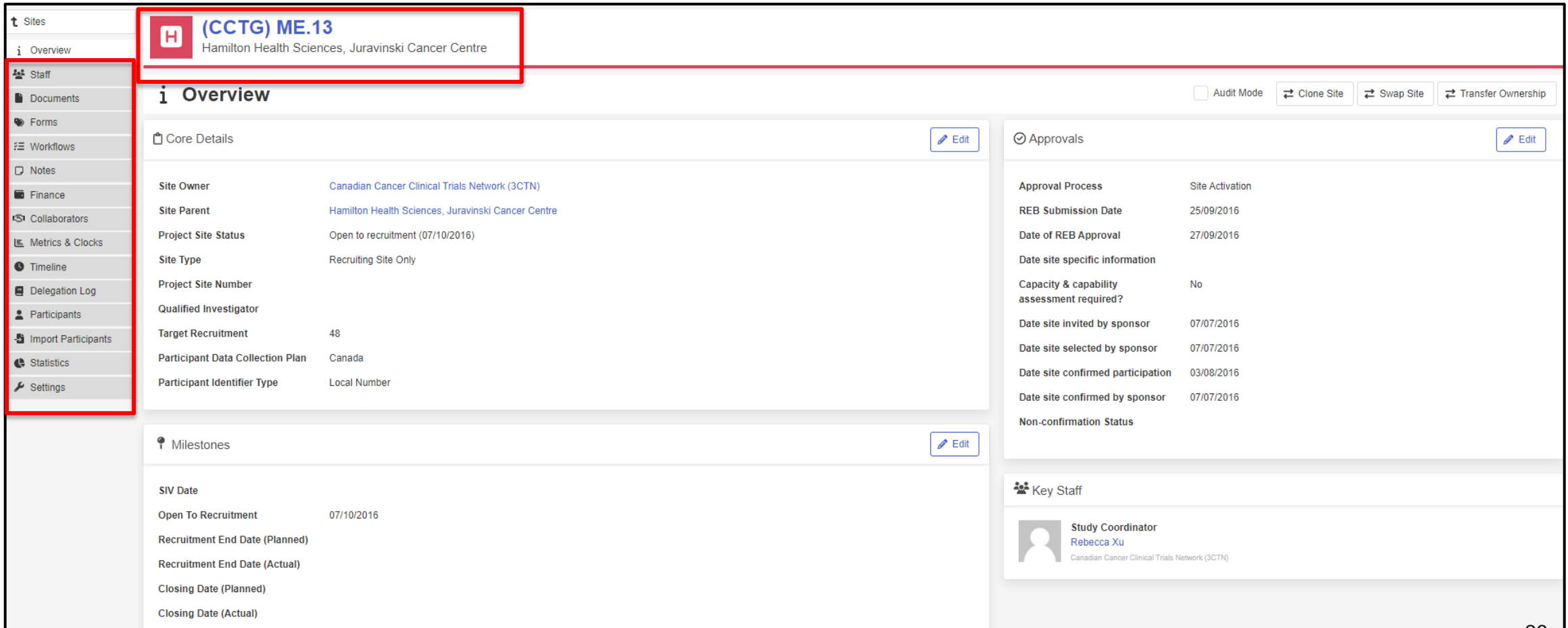
BC - Prince George NACC

Open to recruitment 19/09/2023

Clear list Save Cancel

Overview of Project Site Level

- At the site level, users can manage information related to the specific site
- Update site details (overview), site forms, site process tracking, accrual, staff and site-specific finance. Collaboration with other sites can also be set up here.



Sites

(CCTG) ME.13
Hamilton Health Sciences, Juravinski Cancer Centre

Overview

Core Details [Edit](#)

Site Owner	Canadian Cancer Clinical Trials Network (3CTN)
Site Parent	Hamilton Health Sciences, Juravinski Cancer Centre
Project Site Status	Open to recruitment (07/10/2016)
Site Type	Recruiting Site Only
Project Site Number	
Qualified Investigator	
Target Recruitment	48
Participant Data Collection Plan	Canada
Participant Identifier Type	Local Number

Approvals [Edit](#)

Approval Process	Site Activation
REB Submission Date	25/09/2016
Date of REB Approval	27/09/2016
Date site specific information	
Capacity & capability assessment required?	No
Date site invited by sponsor	07/07/2016
Date site selected by sponsor	07/07/2016
Date site confirmed participation	03/08/2016
Date site confirmed by sponsor	07/07/2016
Non-confirmation Status	

Milestones [Edit](#)

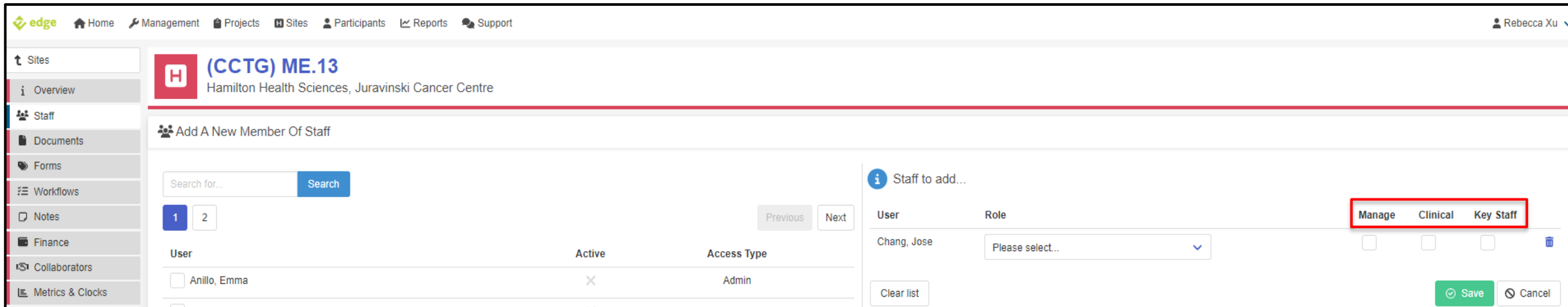
SIV Date	
Open To Recruitment	07/10/2016
Recruitment End Date (Planned)	
Recruitment End Date (Actual)	
Closing Date (Planned)	
Closing Date (Actual)	

Key Staff

Study Coordinator
Rebecca Xu
Canadian Cancer Clinical Trials Network (3CTN)

Add staff to site level

- In the project site level select the **STAFF** tab, and then click **ADD TEAM** or **ADD USER**.
- Select role (if applicable) and determine access level for member:
 - **Manage** – This access allow users to edit any of the data their organization can access (read and write access)
 - **Clinical** – Only clinical access will allow users to see specific patient information. Any staff members at the site level that will be managing patients and patient data to a project will need this access.
 - **Key Staff** – The Key staff feature can be used to identify key members for each project such as the PI, Co-PI, Lead Nurse, CRA etc. They will be listed on the "site details" page.



The screenshot displays the 'Add A New Member Of Staff' interface within the 'edge' system. The top navigation bar includes links for Home, Management, Projects, Sites, Participants, Reports, and Support. The left sidebar lists various site management options: Overview, Staff, Documents, Forms, Workflows, Notes, Finance, Collaborators, and Metrics & Clocks. The main content area is for the site '(CCTG) ME.13' at 'Hamilton Health Sciences, Juravinski Cancer Centre'. It features a search bar and a table of existing staff members. The 'Staff to add...' section on the right includes checkboxes for 'Manage', 'Clinical', and 'Key Staff' roles, which are highlighted with a red box. The 'Manage' checkbox is selected.

User	Active	Access Type
<input type="checkbox"/> Anillo, Emma	<input checked="" type="checkbox"/>	Admin

User	Role	Manage	Clinical	Key Staff
Chang, Jose	Please select...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trial Performance Data Entry

Updating / Adding trial statuses and activation dates

Project Site Detail Page

Sites

Overview

Staff

Documents

Forms

Workflows

Notes

Finance

Collaborators

Metrics & Clocks

Timeline

Delegation Log

Participants

Import Participants

Statistics

Settings

H

(BCC) BEV-DOSE

BC Cancer – Abbotsford

i Overview

Core Details

Site Owner

Canadian Cancer Clinical Trials Network (3CTN)

Site Parent

BC Cancer

Project Site Status

Open to recruitment (26/07/2023)

Site Type

Project Site Number

Qualified Investigator

Ms Rebecca Xu

Target Recruitment

5

Actual Recruitment

4

Participant Data Collection Plan

Canada

Participant Identifier Type

Local Number

Milestones

SIV Date

Open To Recruitment

25/08/2021

Recruitment End Date (Planned)

Recruitment End Date (Actual)

Planned completion date

Completion date

Approvals

Approval Process

Site Activation

REB Submission Date

03/06/2023

Date of REB Approval

24/09/2023

Date site specific information

Capacity & capability assessment required?

No

Date site invited by sponsor

Date site selected by sponsor

Date site confirmed by sponsor

Date site confirmed participation

03/04/2023

Non-confirmation Status

Key Staff

James Schoales

Canadian Cancer Clinical Trials Network (3CTN)

Audit Mode

Clone Site

Swap Site

Edit


Edit



Edit



29

Project Site Detail Page – Details Section

1. **Edit** - For most sections on the project site details page there will be an “Edit” button located to the right of the section header.
 - If you do not see the “Edit” button please make sure that you have “Manage” access to this project site under the Staff Tab.
 - If you have “Manage” access but still don’t see the “Edit” button please make sure the project site is “Owned by” your organization.
2. **Status (Status Date)** – Your sites status for the project e.g. Open to Recruitment . Note you will need to enter a status date.
3. **Site target recruitment** – Your site’s expected recruitment over the lifespan of the project, which is set at the beginning of the trial initiation process. Note this target shouldn’t change.

 Core Details

Site Owner	Canadian Cancer Clinical Trials Network (3CTN)
Site Parent	BC Cancer
Project Site Status	Open to recruitment (26/07/2023) 
Site Type	
Project Site Number	
Qualified Investigator	Ms Rebecca Xu
Target Recruitment	5 
Actual Recruitment	4
Participant Data Collection Plan	Canada
Participant Identifier Type	Local Number

Project Site Detail Page

31

Project Site Detail Page – Approvals Section

By default the “Approvals” section will only show REB and SSI dates. You will need to change the “Approval process” from “REB Approval” to “Site Activation”.

✓ Add Approval

Approval Process

REB Approval ▼

REB Submission Date

04/06/2023 × 📅

Date of REB Approval

25/09/2023 × 📅

Date site specific information

× 📅

✓ Save

⊘ Cancel

✓ Add Approval

Approval Process

REB Approval ▼

(No approval process)
REB Approval
Site Activation
04/06/2023

Date of REB Approval

25/09/2023 × 📅

Date site specific information

× 📅

✓ Save

⊘ Cancel



Project Site Detail Page – Approvals Section

You will now be able to add the “Start Date of Site Activation Process” in the “Date site confirmed participation” data field.

If you will also add your site’s REB submission and approval dates in this section.

Note: REB dates are the initial submission and approval dates.

The screenshot shows the 'Approvals Section' of the Project Site Detail Page. The form contains several date fields, each with a text input, a clear button (X), and a calendar icon. A red box highlights the 'REB Submission Date' field (04/06/2023) and the 'Date of REB Approval' field (25/09/2023), with a red arrow pointing to them from the right. Another red box highlights the 'Date site confirmed participation' field (04/04/2023), with a red arrow pointing to it from the right. The form also includes a 'Date site specific information' field, a checkbox for 'Capacity & capability assessment required?', a 'Date site invited by sponsor' field, a 'Date site selected by sponsor' field, and a 'Date site confirmed by sponsor' field. At the bottom, there is a 'Non confirmation Status' dropdown menu with the text 'Please choose...' and two buttons: 'Save' (green) and 'Cancel' (grey).

Approval Process

Site Activation

REB Submission Date

04/06/2023

Date of REB Approval

25/09/2023

Date site specific information

Capacity & capability assessment required?

Date site invited by sponsor

Date site selected by sponsor

Date site confirmed by sponsor

Date site confirmed participation

04/04/2023

Non confirmation Status

Please choose...

Save Cancel

Project Site Detail Page

Sites

Overview

Staff

Documents

Forms

Workflows

Notes

Finance

Collaborators

Metrics & Clocks

Timeline

Delegation Log

Participants

Import Participants

Statistics

Settings

H

(BCC) BEV-DOSE

BC Cancer – Abbotsford

i Overview

Core Details

Edit

Site Owner

Canadian Cancer Clinical Trials Network (3CTN)

Site Parent

BC Cancer

Project Site Status

Open to recruitment (26/07/2023)

Site Type

Project Site Number

Qualified Investigator

Ms Rebecca Xu

Target Recruitment

5

Actual Recruitment

4

Participant Data Collection Plan

Canada

Participant Identifier Type

Local Number

Milestones

Edit

SIV Date

Open To Recruitment

25/08/2021

Recruitment End Date (Planned)

Recruitment End Date (Actual)

Planned completion date

Completion date

Approvals

Edit

Approval Process

Site Activation

REB Submission Date

03/06/2023

Date of REB Approval

24/09/2023

Date site specific information

Capacity & capability assessment required?

No

Date site invited by sponsor

Date site selected by sponsor

Date site confirmed by sponsor

Date site confirmed participation

03/04/2023

Non-confirmation Status

Key Staff

James Schoales

Canadian Cancer Clinical Trials Network (3CTN)

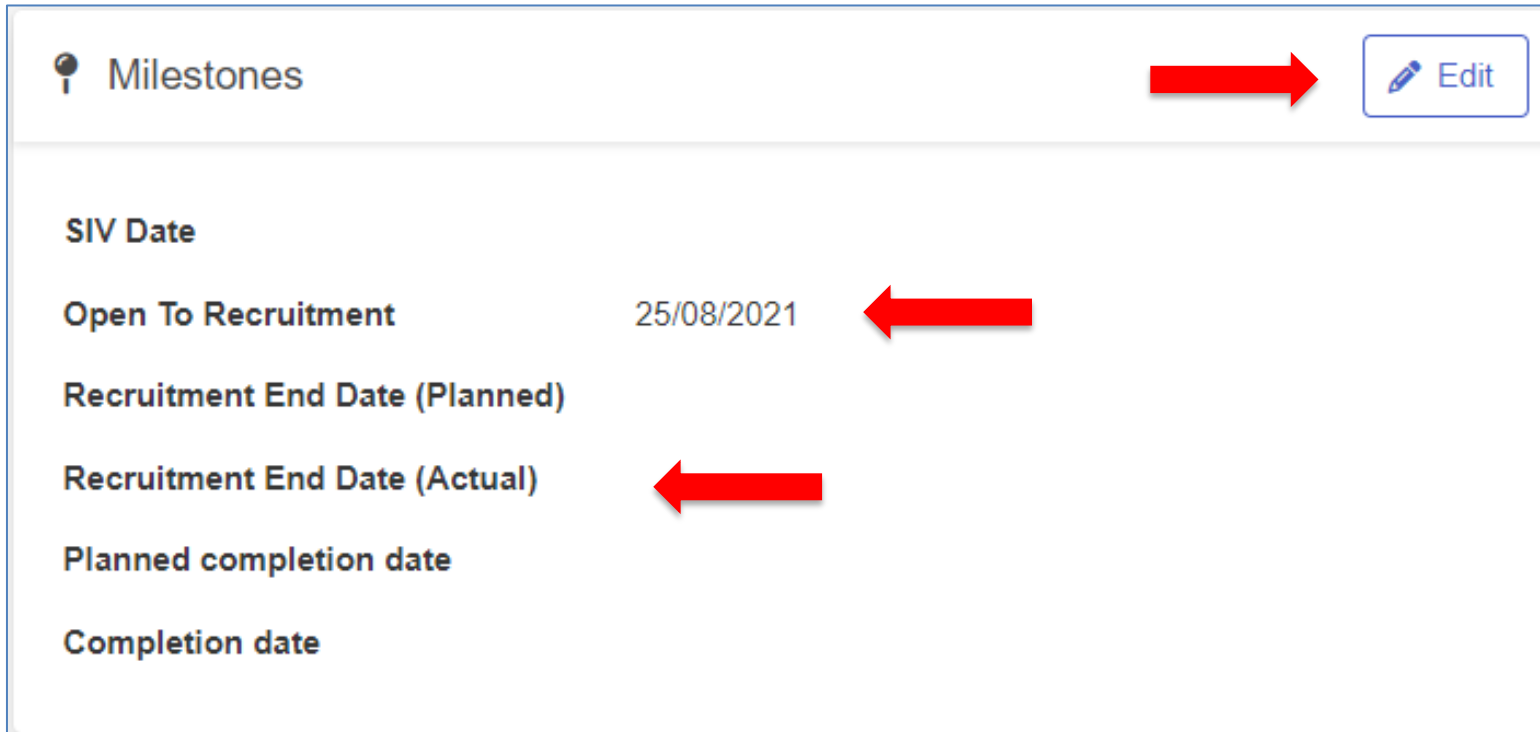
Audit Mode




Clone Site

Swap Site


Project Site Detail Page – Milestones Section

1. **Edit** – Clicking “Edit” will open a dialogue box that will enable you to update or add information.
2. **Open to recruitment** – Date your site is initially authorized to open to recruitment (dd/mm/yyyy)
3. **Recruitment end date** – Date your site is closed to recruitment. (dd/mm/yyyy)




 Milestones  

SIV Date

Open To Recruitment 25/08/2021 


Recruitment End Date (Planned)

Recruitment End Date (Actual) 

Planned completion date

Completion date

Knowledgebase - Tutorial Articles


[Home](#)
[Management](#)
[Projects](#)
[Sites](#)
[Participants](#)
[Reports](#)
[Support](#)

James Schoales

[Support](#)
[KnowledgeBase](#)
[Videos](#)
[Release Notes](#)

[KnowledgeBase Home](#) / 5 - Managing Projects and Projec...

5.1 - Setting up Projects

Learn how to add Projects to EDGE, including definitions for all fields

- [5101 - Searching for a Project in EDGE](#)
- [5102 - Creating a New Project](#)
- [5103 - Removing Organisational Involvement in a Project](#)
- [5104 - Deleting a Project](#)
- [5105 - Managing Project Involvement Requests](#)

5.2 - Managing Projects

Learn about managing all parts of the Project section within EDGE

- [5200 - Project Data Dictionary](#)
- [5201 - Project Ownership](#)
- [5202 - How to Add a Chief Investigator to a Project](#)
- [5203 - How to Transfer Project Ownership](#)
- [5204 - How to Assign / Unassign a Site from a Project](#)
- [5205 - How to Manage Staff on a Project](#)
- [5206 - How to Add Forms and Fields to a Project](#)
- [5207 - How to Update Fields on a Form](#)
- [5208 - How to Add a Workflow to a Project](#)
- [5209 - How to Add a Project Note](#)
- [5210 - Project and Project Site Finance Overview](#)
- [5211 - How to Add an Organisation to a Project](#)
- [5212 - How to Set Up Project Collaborations](#)

5.3 - Managing Project Sites

Learn about managing all parts of the Project Sites section within Projects

- [5300 - Project Site Data Dictionary](#)
- [5301 - How to Manage Staff on a Project Site](#)
- [5302 - How to Transfer Ownership of a Project Site](#)
- [5303 - How to Use the Swap Site Function on a Project Site](#)
- [5304 - How to Clone a Project Site](#)
- [5305 - How to Add Forms and Fields to a Project Site](#)
- [5306 - How to Update Fields on a Form](#)
- [5307 - How to Add a Workflow to a Project Site](#)
- [5308 - How to Add a Project Site Note](#)
- [5309 - Project Site Finance Overview](#)
- [5310 - How to Set Up a Project Site Collaboration](#)
- [5311 - Project Site Metrics & Clocks](#)
- [5312 - Project Site Timeline](#)

5.4 - Managing Projects and Proj...

Learn about managing Projects and Project Site documents

- [5400 - Documents on Projects and Project Sites](#)
- [5401 - How to Upload a Document to a Project/Project Site](#)
- [5402 - How to Update a Document on a Project/Project Site](#)
- [5403 - How to Upload a New Version of a Document](#)
- [5404 - How to Delete a Project/Project Site Document](#)

Reporting and Tracking Patients

Manually Adding Patients

Patient Reporting – Mandatory Information

Patient Information:

- **Subject ID** – used for patient verification
- **Date consented** – used for multi-staged registration trials
- **Date recruited/randomized** – used to track patient recruitment by quarter

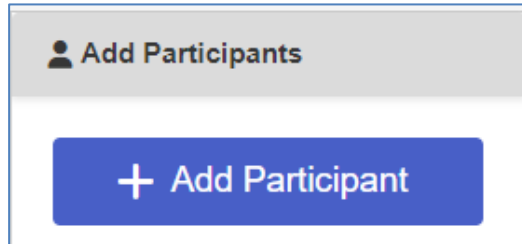
Supplemental, Priority Patient Information (for AYA or Remote trial participants only):

- **AYA Patient?** (age 15-39) – Yes or No
- **Remote Patient?** – Yes or No
- **Satellite Site Name** – Full name of satellite site
- **Type of Satellite Site** – Primary Oncology Site or Closer to Home Healthcare provider
- **Initial Date of Remote Trial Access** – Date patient receives initial trial related care/support at satellite site
- **Satellite Site Clinical Trial Conduct** – Trial conduct being preformed at satellite site
- **Remote Access Comments** – Additional context to help with eligibility evaluation

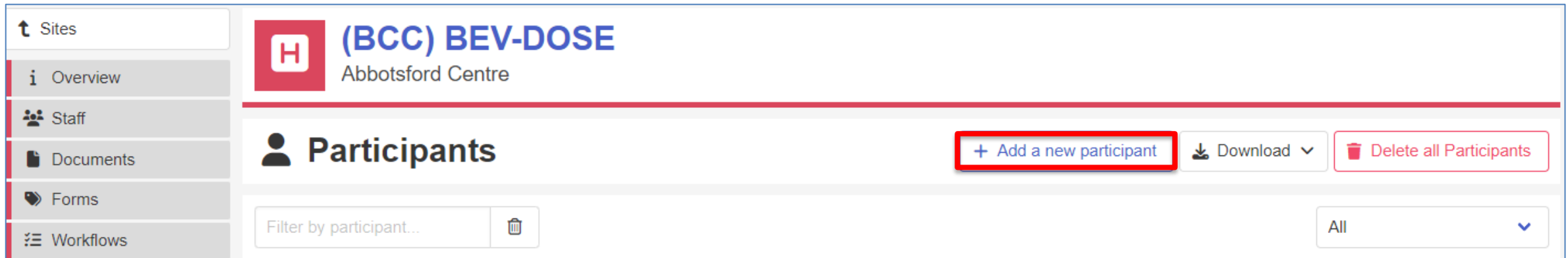
Manually Adding a Participant - Options

There are **2** ways to manually add participants to EDGE:

1. Using the “Add Participant” button on the home page




2. At the project site level (red banner) of a trial



Note: Both these options require you to have Clinical access to the project site level of the trial and the trial is open to recruitment at your project site level.

Adding a Participant – Participant Details


 **Add Participant**

Project Sites you have recently recruited to

Search Your Clinical Projects

Project

(BCC) BEV-DOSE




Search

You are assigned to these 2 sites:

Abbotsford Centre



 **Add Participant**

1 Identifiers

2 Details

3 Status

4 Off Study

5 Comments

6 Summary

Local Number

ID Number

First Name

First name

Last Name


Last name

Gender

Please select... ▼

Optional Fields

Adding a Participant – Participant Details

 **Add Participant**

1

2

3

4

5

6


IdentifiersDetailsStatusOff StudyCommentsSummary

Subject ID


Screening ID

Other ID


Project Arms





Responsible Physician



Referring Site




Date Referred

Optional Fields

Adding a Participant – Participant Status Dates

 **Add Participant**

1

Identifiers

2

Details

3

Status

4

Off Study

5

Comments

6

Summary

ⓧ Exit Wizard

< Previous

> Next

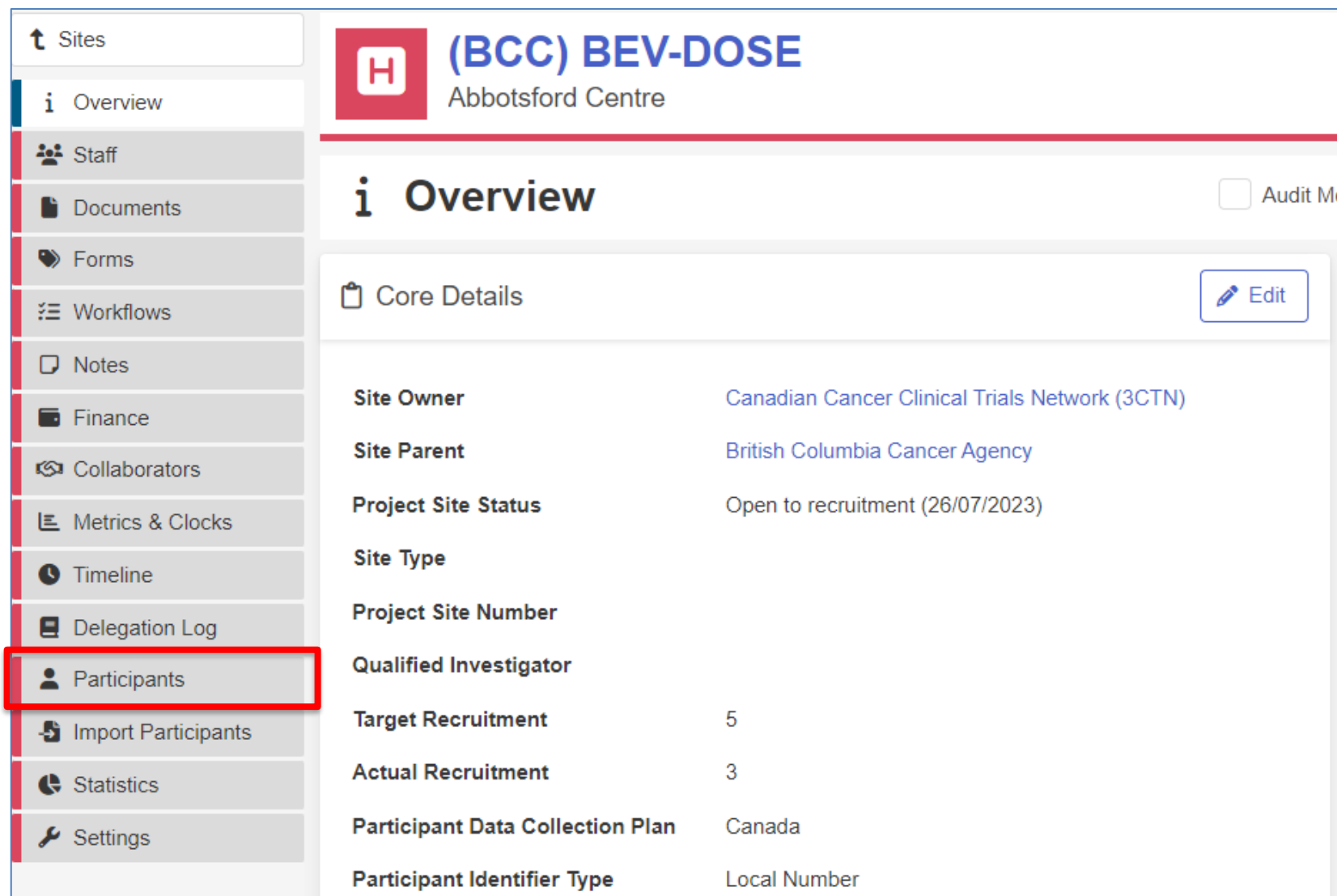
Note: All previous dates must also be filled in.

ⓧ Exit Wizard

< Previous

> Next

Adding a Participant – Within the Project Site level



Sites

- Overview
- Staff
- Documents
- Forms
- Workflows
- Notes
- Finance
- Collaborators
- Metrics & Clocks
- Timeline
- Delegation Log
- Participants**
- Import Participants
- Statistics
- Settings

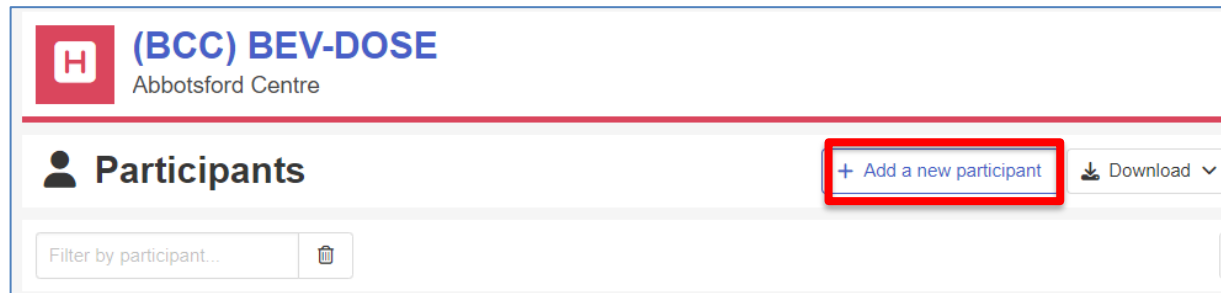
(BCC) BEV-DOSE
Abbotsford Centre

Overview ☐ Audit Me


Core Details [Edit](#)


Site Owner	Canadian Cancer Clinical Trials Network (3CTN)
Site Parent	British Columbia Cancer Agency
Project Site Status	Open to recruitment (26/07/2023)
Site Type	
Project Site Number	
Qualified Investigator	
Target Recruitment	5
Actual Recruitment	3
Participant Data Collection Plan	Canada
Participant Identifier Type	Local Number

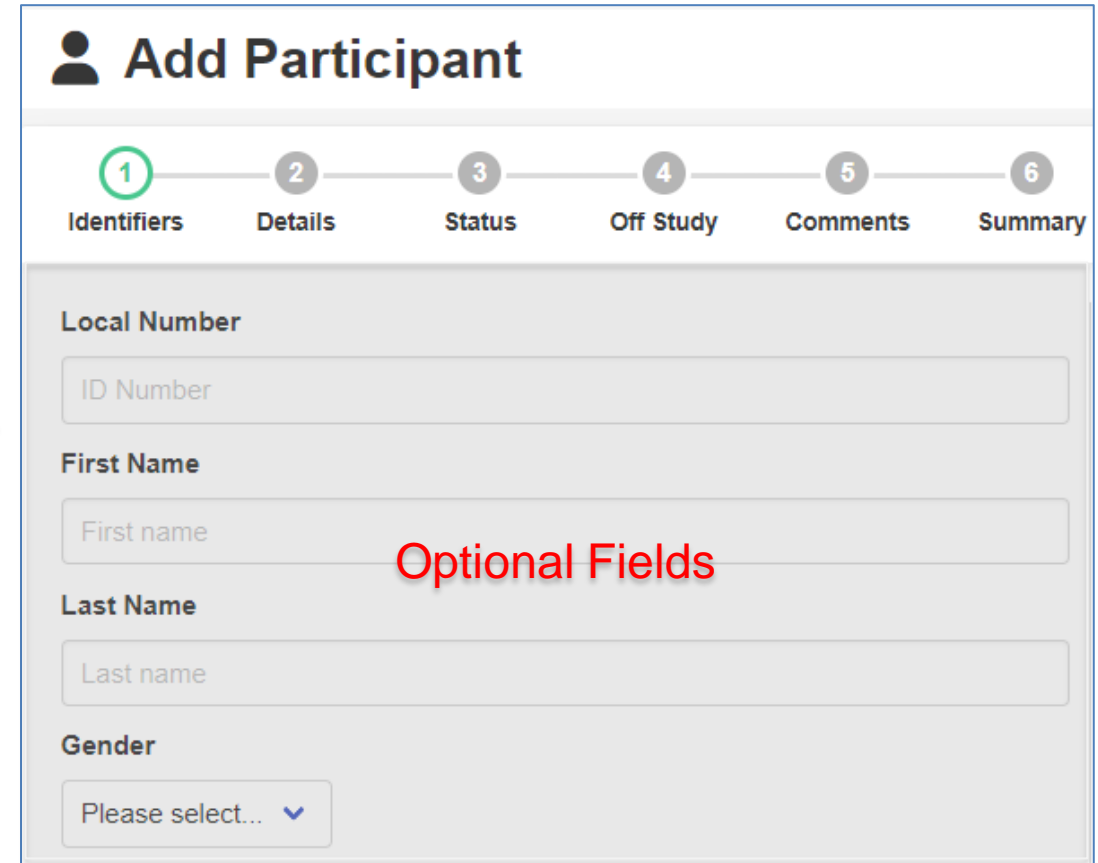
Adding a Participant – Participant Details



(BCC) BEV-DOSE
Abbotsford Centre

Participants [+ Add a new participant](#) [Download](#) 

Filter by participant... 




Add Participant

1 Identifiers 2 Details 3 Status 4 Off Study 5 Comments 6 Summary

Local Number


First Name

Last Name

Gender
 

Optional Fields

Adding a Participant – Participant Details

 **Add Participant**

1

2

3

4

5

6


IdentifiersDetailsStatusOff StudyCommentsSummary

Subject ID


Screening ID

Other ID


Project Arms





Responsible Physician



Referring Site




Date Referred

Optional Fields

Adding a Participant – Participant Status Dates

 **Add Participant**

1

Identifiers

2

Details

3

Status

4

Off Study

5

Comments

6

Summary

Exit Wizard

Previous

Next

Note: All previous dates must also be filled in.

Exit Wizard

Previous

Next

Reporting and Tracking Patients

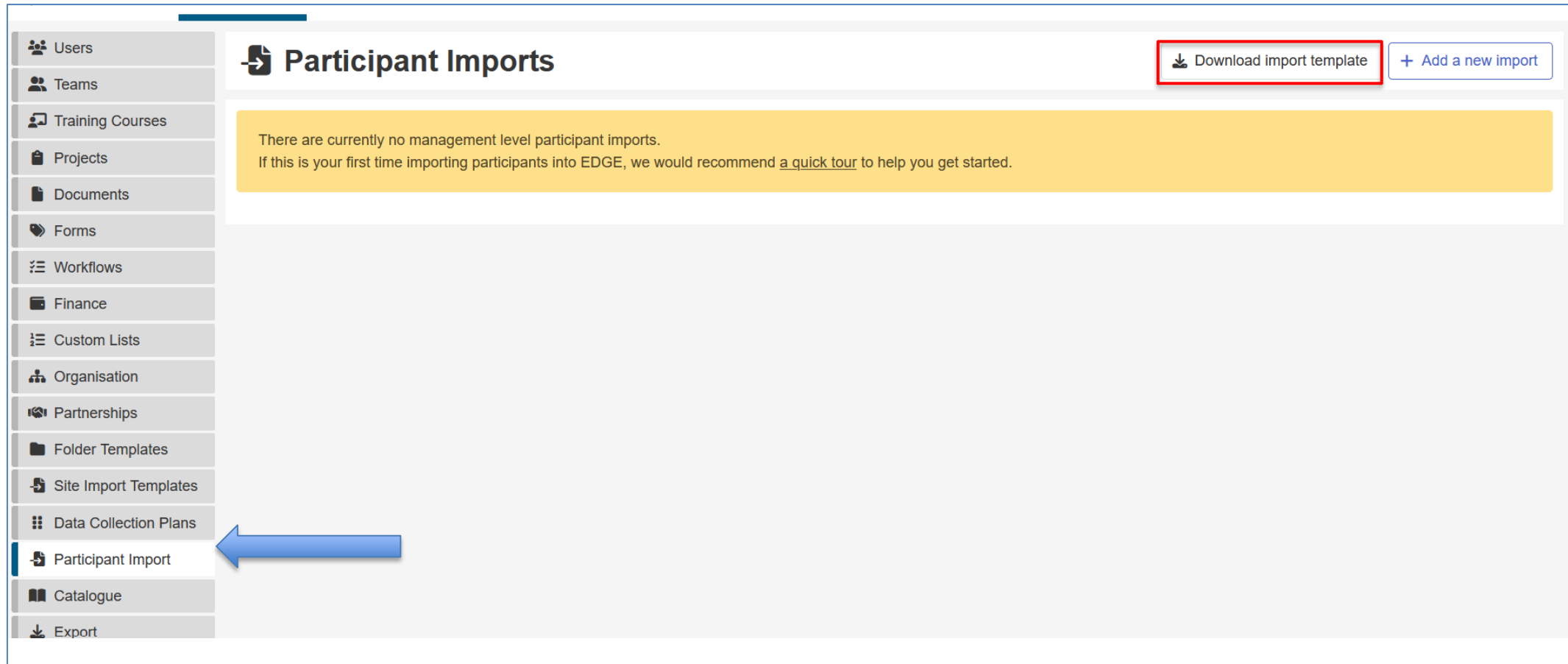
Bulk Import Patients

Importing Methods

- Management Tab Import (Bulk Import)
 - Allows admin users to import participants to multiple projects/project sites at once regardless of project or project site status
 - Main drawback is the limited participant information that can be imported
 - Import template can be downloaded and completed
- Project/Project Site Level Import (Detailed Import)
 - Allows users with manager/clinical access import participants to a single project or project site
 - Import template can be downloaded and filled out
 - Allows the most participant details to be imported (e.g. all workflow status, comments and off study reasons)

Bulk Importing

- In the **Management** tab click on **Participant Import**
- Click **Download import template** to download a .csv import template



The screenshot shows the 'Participant Imports' page. On the left is a sidebar menu with various options. The 'Participant Import' option is highlighted with a blue bar and a blue arrow pointing to it. In the top right corner of the main content area, there are two buttons: 'Download import template' (which is highlighted with a red rectangle) and '+ Add a new import'. Below these buttons is a yellow message box stating: 'There are currently no management level participant imports. If this is your first time importing participants into EDGE, we would recommend [a quick tour](#) to help you get started.'

Users

Teams

Training Courses

Projects

Documents

Forms

Workflows

Finance

Custom Lists

Organisation

Partnerships

Folder Templates

Site Import Templates

Data Collection Plans

Participant Import

Catalogue

Export

Participant Imports

Download import template + Add a new import

There are currently no management level participant imports.
If this is your first time importing participants into EDGE, we would recommend [a quick tour](#) to help you get started.

Bulk Importing – Template Data Fields

- The following data fields (**red** = mandatory) are available in the import template:

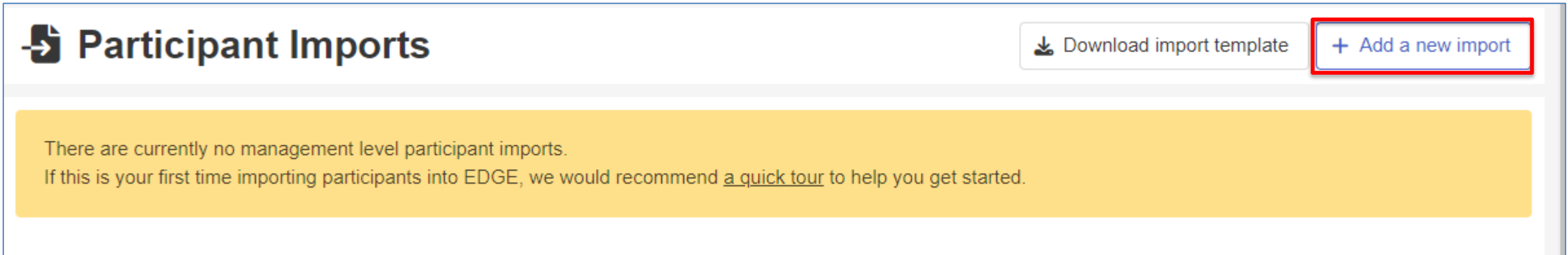
- **Project Title**
- **Site Name**
- Identifier Number
- Title
- First name
- Last name
- Date of Birth
- Gender
- Date of Death
- Study ID
- **Subject ID**
- Screening ID
- Other ID
- Ethnicity
- Participant Type
- Project Arm
- Referring Site
- Responsible Physician
- **Screened Date**
- **Screened By**
- Recruited Date
- Recruited By
- Off Study Date
- Off Study By
- Off Study Reason
- Off Study Decision
- Off Study Description
- Off Study Comments
- Patient Comments


Bulk Importing

- Once you have completed the import template you will need to make sure that it is formatted correctly and saved as a CSV file
- Date format should be dd/mm/yyyy
- Project Site name and Project Short title should match what is in EDGE
- Make sure the Project Site is attached to the trials
- Users/Staff names should be Last Name, First Name

Bulk Importing

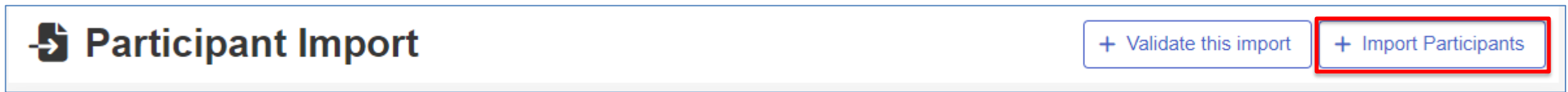
- Once Template and CSV are complete, click **+ Add a new import**




 **Participant Imports** Download import template **+ Add a new import**

There are currently no management level participant imports.
If this is your first time importing participants into EDGE, we would recommend [a quick tour](#) to help you get started.

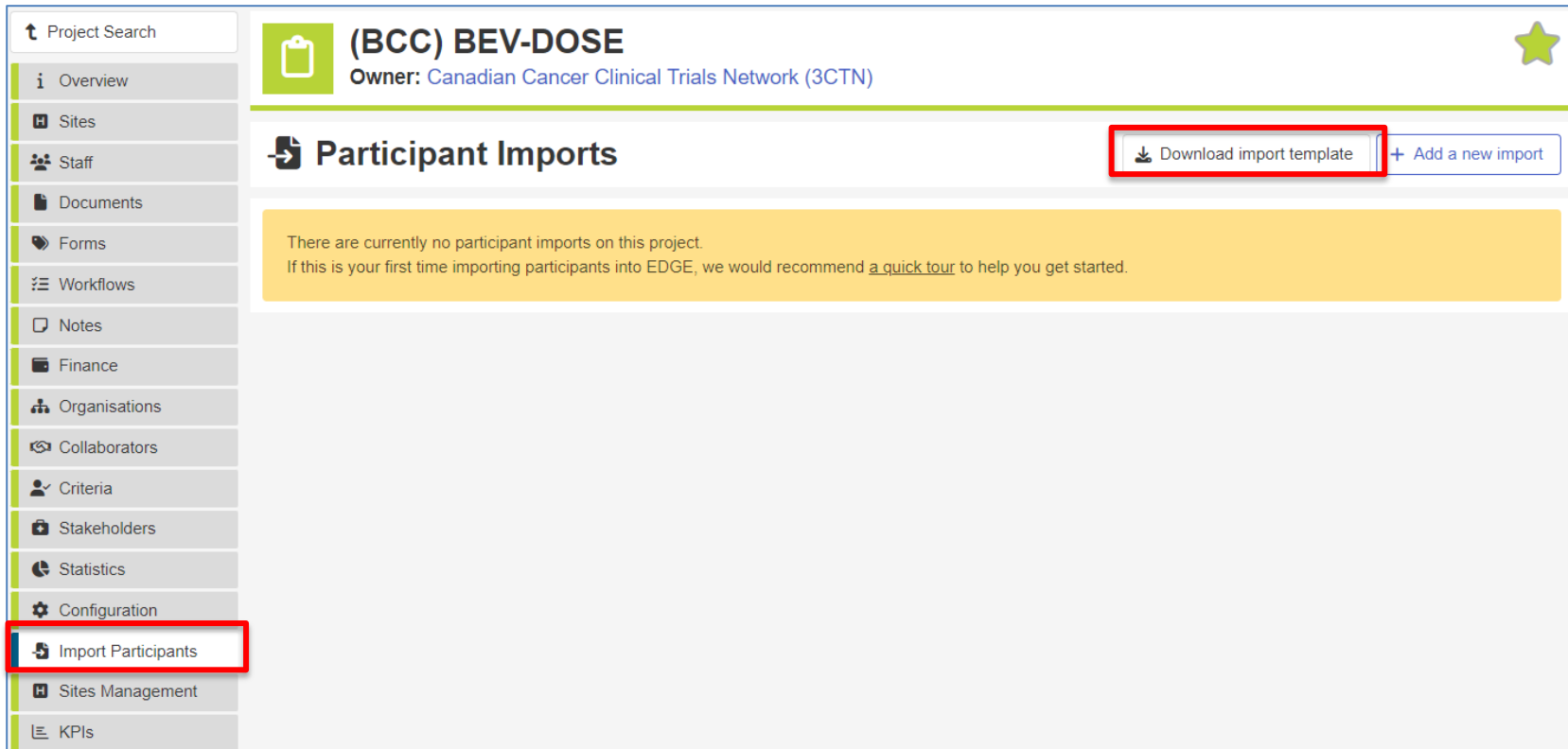
- Select your CSV file and click import.
- You will be brought to an Import overview page where you can see what is being imported and can make corrections if there are any errors. Once the import is finalized click **+ Import Participants**



 **Participant Import** + Validate this import **+ Import Participants**

Detailed Import

- You can navigate to the project or project site level of the project you are going to import participants to.
- Click **Import Participants** in the left navigation bar and click **Download import template**



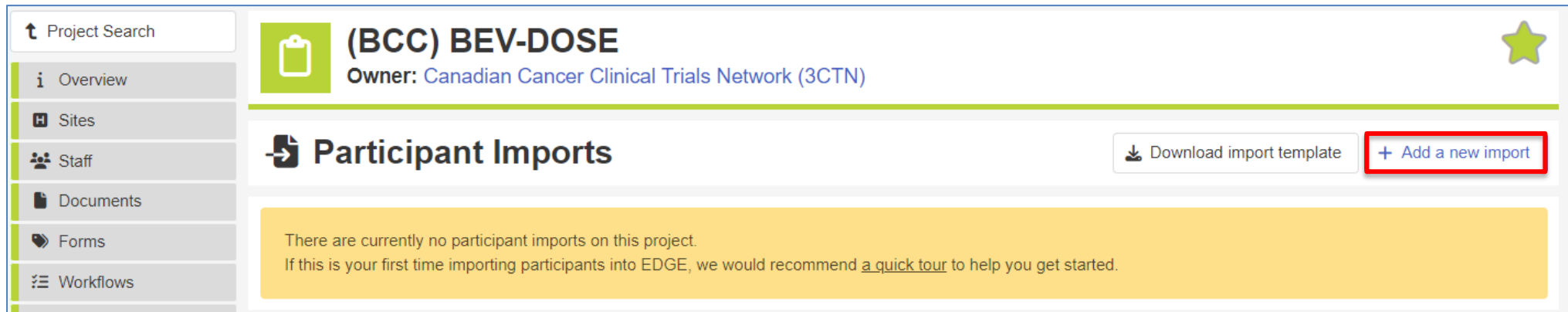
The screenshot displays the user interface for the (BCC) BEV-DOSE project. On the left, a vertical navigation menu lists various project management tools. The 'Import Participants' option is highlighted with a red rectangular box. The main content area is titled '(BCC) BEV-DOSE' and 'Owner: Canadian Cancer Clinical Trials Network (3CTN)'. Below this, the 'Participant Imports' section is visible, featuring a 'Download import template' button (also highlighted with a red box) and an 'Add a new import' button. A yellow informational banner states: 'There are currently no participant imports on this project. If this is your first time importing participants into EDGE, we would recommend a [quick tour](#) to help you get started.'

Detailed Importing – Template Data Fields (Project Level)

- The following data fields (**red** = mandatory) are available in the import template:
 - **Site Name**
 - Identifier Number
 - Title
 - First name
 - Last name
 - Date of Birth
 - Gender
 - Date of Death
 - Study ID
 - **Subject ID**
 - Screening ID
 - Other ID
 - Ethnicity
 - Participant Type
 - Project Arm
 - Referring Site
 - Responsible Physician
 - **Pre-Screened Date**
 - **Pre-Screened By**
 - Approached Date
 - Approached By
 - Consented Date
 - Consented By
 - Screened Date
 - Screened By
 - Recruited / Randomised Date
 - Recruited / Randomised By
 - On treatment Date
 - On treatment By
 - On follow-up Date
 - On follow-up By
 - Completed Date
 - Completed By
 - Off Study Date
 - Off Study By
 - Off Study Reason
 - Off Study Decision
 - Off Study Description
 - Off Study Comments
 - Patient Comments

Detailed Import

- You will now have an Excel file with column headers for participant identifiers, details and participant statuses.
- Fill out this Excel template using the participant information you want to import making sure not to skip statuses and save as a CSV file. Then you can go back to the **Import Participant** tab of the project and upload the CSV file. A similar Import overview page window will open where you can see what is being imported and can make corrections if there are any errors. Once the import is finalized click **Import participants**.



Project Search

(BCC) BEV-DOSE
Owner: Canadian Cancer Clinical Trials Network (3CTN)

Overview
Sites
Staff
Documents
Forms
Workflows

Participant Imports

Download import template + Add a new import

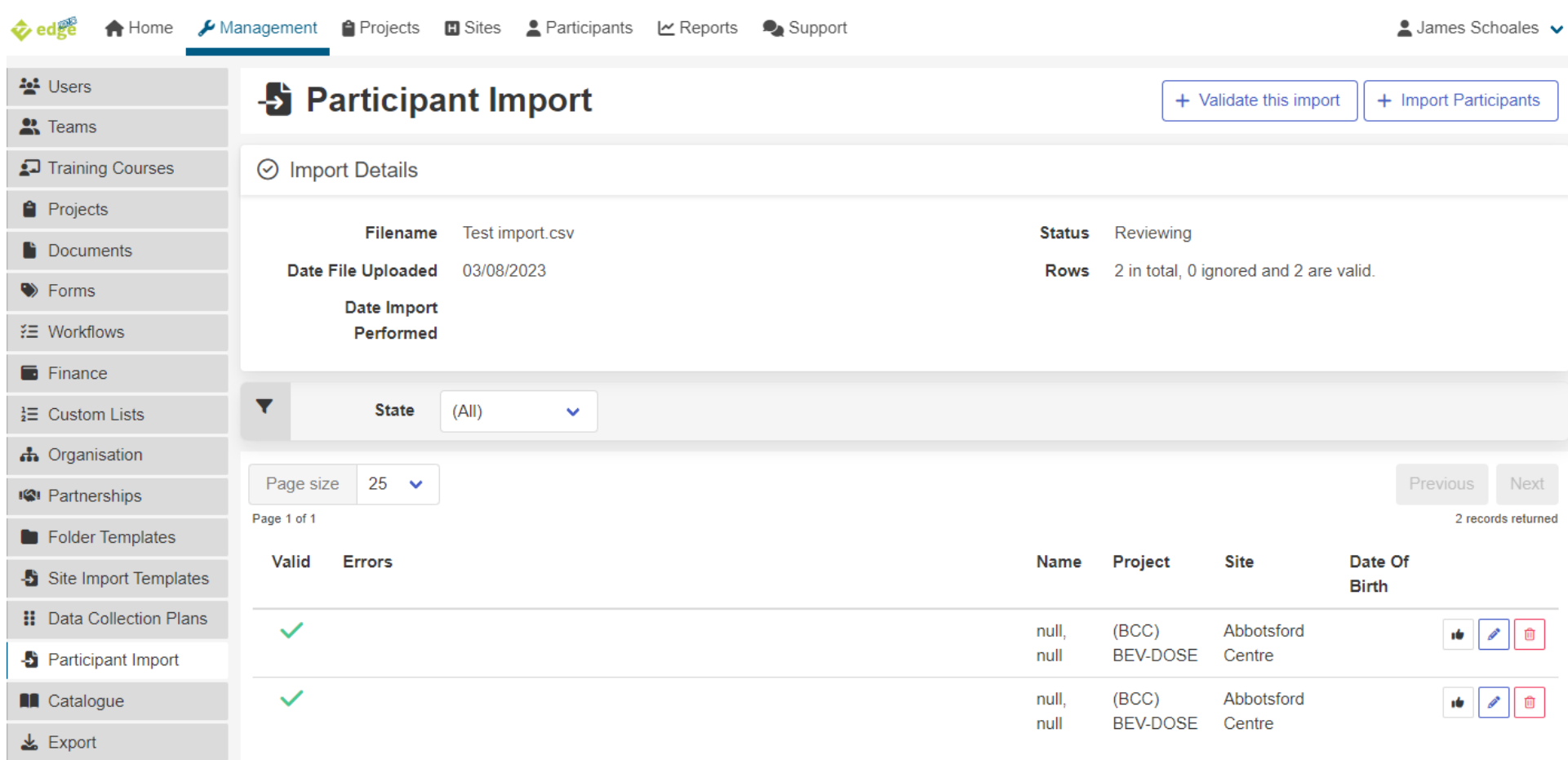
There are currently no participant imports on this project.
If this is your first time importing participants into EDGE, we would recommend [a quick tour](#) to help you get started.

Bulk Importing – Import File Verification

- Once Import template is set up, ensure:
 - Excel is formatted correctly
 - Saved as a .CSV file
- Date format should be *dd/mm/yyyy*
- ***Project Site*** name and ***Project Short title*** should match what is in EDGE
- Make sure the ***Project Site*** is attached to the trials

Bulk Importing – Check the Data, Validate and Import

Once imported, review the *import preview pane* to verify which patients are being imported and to identify data errors.









The screenshot shows the 'Participant Import' page. The top navigation bar includes 'Home', 'Management', 'Projects', 'Sites', 'Participants', 'Reports', and 'Support'. The user 'James Schoales' is logged in. The left sidebar lists various system components, with 'Participant Import' selected. The main content area is titled 'Participant Import' and includes two buttons: '+ Validate this import' and '+ Import Participants'.

Import Details

Filename	Test import.csv	Status	Reviewing
Date File Uploaded	03/08/2023	Rows	2 in total, 0 ignored and 2 are valid.
Date Import Performed			

Below the details, there is a filter section with a 'State' dropdown set to '(All)'. A 'Page size' dropdown is set to 25, and 'Page 1 of 1' is displayed. Navigation buttons 'Previous' and 'Next' are present, along with a note '2 records returned'.

Valid	Errors	Name	Project	Site	Date Of Birth	
✓		null, null	(BCC) BEV-DOSE	Abbotsford Centre		  
✓		null, null	(BCC) BEV-DOSE	Abbotsford Centre		  

Reporting and Tracking Patients

Priority Patient Reporting

Priority Patient Tracking

Priority patient information will be tracked at the participant level. Patients will have to have been added to the trial beforehand (manually or imported).

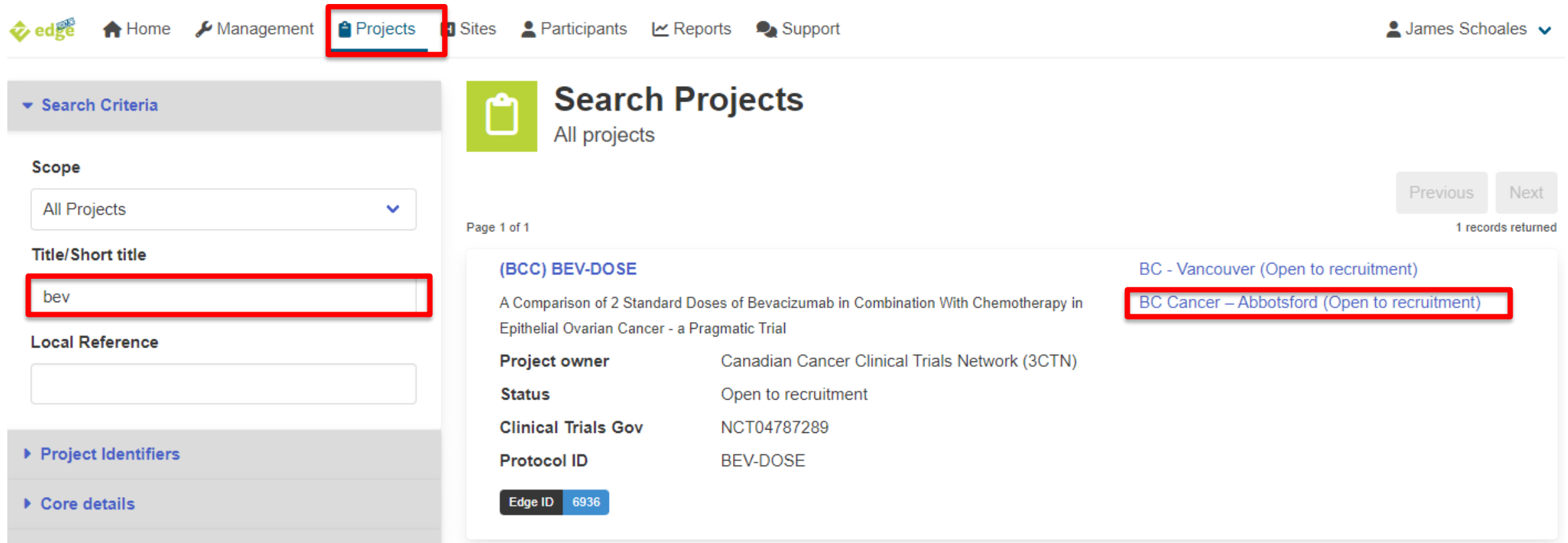
Priority Patient Information (filled out for AYA or Remote patients only):

Data Field	Options
AYA Patient? (age 15-39)	Yes or No
Remote Patient?	Yes or No
Satellite Site Name	Full name of Satellite Site
Type of Satellite Site	Primary Oncology Site or Closer to Home Healthcare provider
Date of Remote Access Initiation	Date patient receives trial related care/support at satellite site
Satellite Site Clinical Trial Conduct	Trial conduct being preformed at satellite site
Remote Access Comments	Additional context to help with eligibility evaluation

Definitions available: <https://3ctn.ca/files/remote-access-ibf-definition>

Priority Patient Tracking - Navigation

- Go to *Projects* tab and search for the trial
- Select your *Project Site Name* to the right of the trial information



edge Home Management **Projects** Sites Participants Reports Support James Schoales

▼ Search Criteria

Scope
All Projects

Title/Short title
bev

Local Reference

► Project Identifiers

► Core details

Search Projects
All projects

Page 1 of 1

Previous Next
1 records returned

(BCC) BEV-DOSE
A Comparison of 2 Standard Doses of Bevacizumab in Combination With Chemotherapy in Epithelial Ovarian Cancer - a Pragmatic Trial

Project owner Canadian Cancer Clinical Trials Network (3CTN)
Status Open to recruitment
Clinical Trials Gov NCT04787289
Protocol ID BEV-DOSE

Edge ID 6936

BC - Vancouver (Open to recruitment)
BC Cancer – Abbotsford (Open to recruitment)

Priority Patient Tracking - Navigation

- At the project site level (red banner) click the patient tab
- Click on patient's "name" to the left of the patient information

Sites

Overview

Staff

Documents

Forms

Workflows

Notes

Finance

Collaborators


Metrics & Clocks

Timeline

Delegation Log

Participants

Import Participants


(BCC) BEV-DOSE
BC Cancer – Abbotsford

Participants

[+ Add a new participant](#)
[Download](#)
[Delete all Participants](#)

Name / Identifiers

Date of Birth

Update results

Reset

Current Status

(All status)

Page 1 of 1

Previous

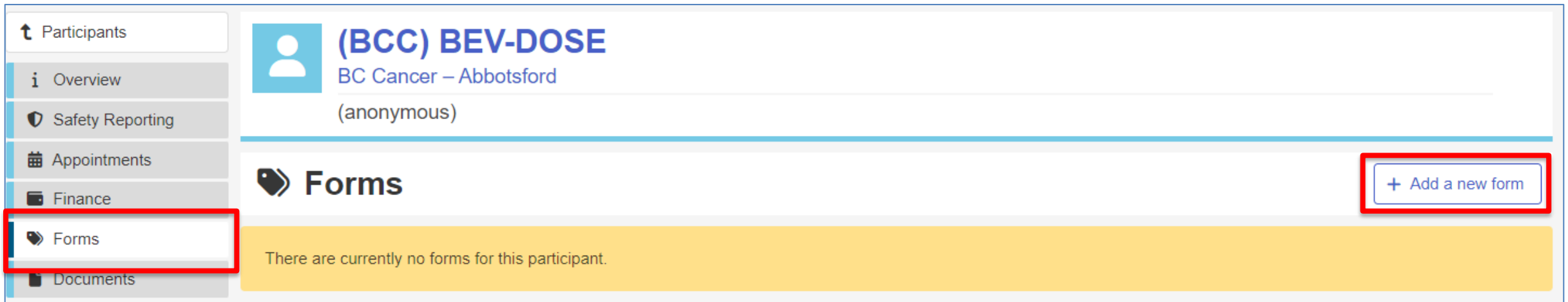
Next

6 records returned

Name	Date of Birth	Identifiers	Study ID	Subject ID	Screening ID	Other ID	Current Status	Current Status Date
(anonymous)				123456			Recruited / Randomised	03/04/2023

Priority Patient Tracking – Data Entry

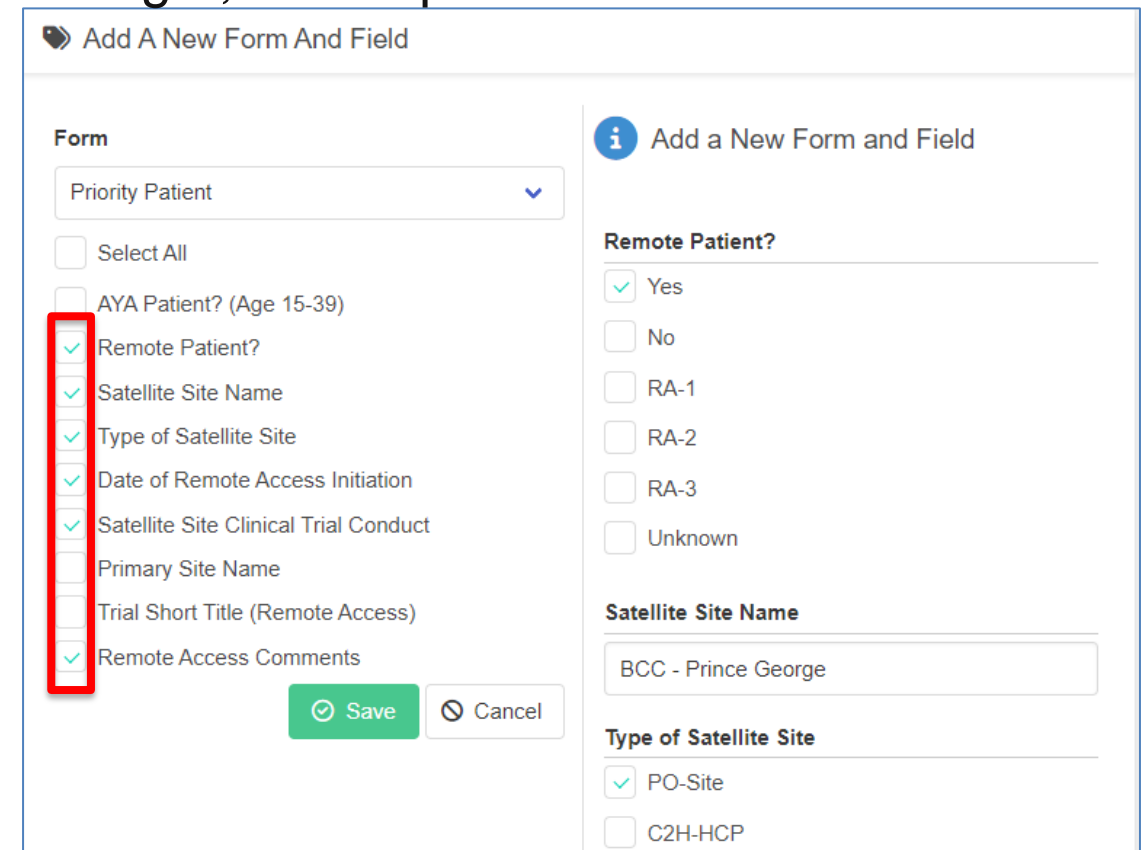
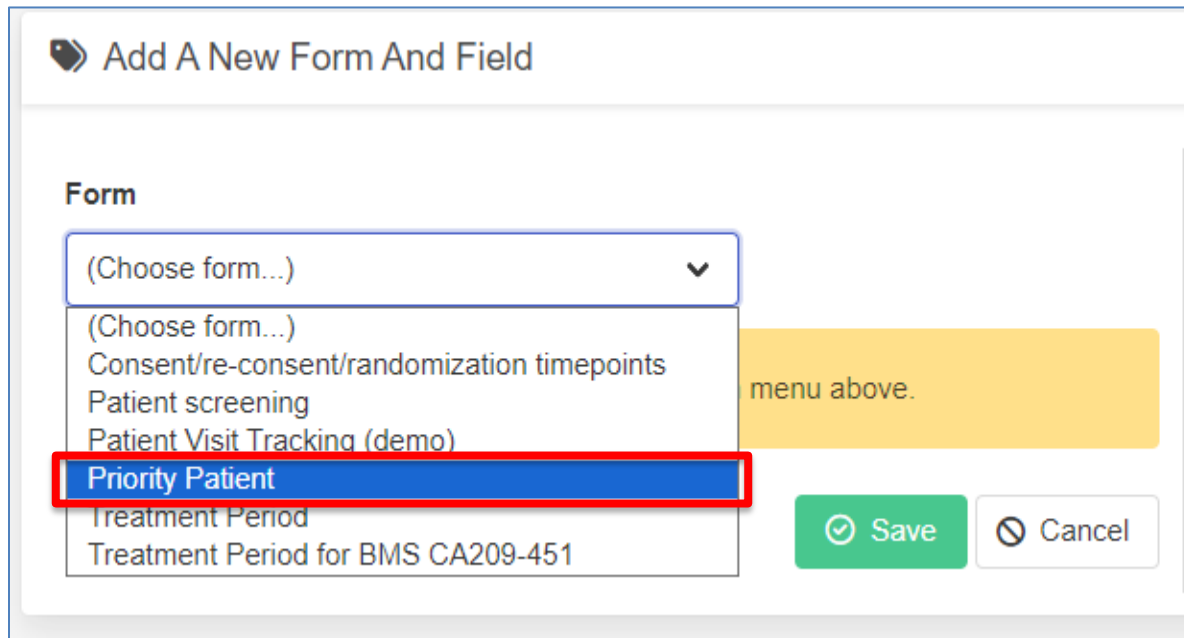
- At the *Participant* level, go to *Forms*
- Select *Add a new form*



The screenshot displays the 'Forms' section for a participant named '(BCC) BEV-DOSE' from 'BC Cancer – Abbotsford' (anonymous). The left sidebar contains a menu with options: Participants, Overview, Safety Reporting, Appointments, Finance, Forms (highlighted with a red box), and Documents. The main content area shows the 'Forms' title with a tag icon and a '+ Add a new form' button (also highlighted with a red box). Below this, a yellow message box states: 'There are currently no forms for this participant.'

Priority Patient Tracking – Navigation / Data Entry

- Select the *Priority Patient* Form
- Check the box of relevant fields (below is an example of Remote Access Patient reporting by Primary Site) and fill in fields on the right, to complete relevant data



Priority Patient Reporting

- A priority patient report has been created for portal sites
- Date filters are used to limit data to current quarter
- Update the date filters to focus data on quarters being reported
- Run and download report results to MSExcel

Participant Forms Report

Report Criteria Priority Patient Report ver 2 Clear Load Save Save As...

Fields + Add Field

Project Site Name	Add Filter	x
Project Short Title	Add Filter	x
Subject ID	Add Filter	x
AYA Patient? (Age 15-39)	Add Filter	x
Remote Patient?	Add Filter	x
Date Randomised / Recruited	Add Filter	x
Date of Remote Access Initiation	Add Filter	x
Satellite Site Name	Add Filter	x
Type of Satellite Site	Add Filter	x
Satellite Site Clinical Trial Conduct	Add Filter	x
Remote Access Comments	Add Filter	x
Project type	Add Filter	x

Filters

Project Type Is Equal To Academic portfolio x

AND

Remote Patient? Is Like yes x

AND

Date of Remote Access Initiation Is Greater Than 31/03/2022 x

AND

Date of Remote Access Initiation Is Less Than 01/07/2022 x

OR

Project Type Is Equal To Academic portfolio x

AND

AYA Patient? (Age 15-39) Is Like yes x

AND

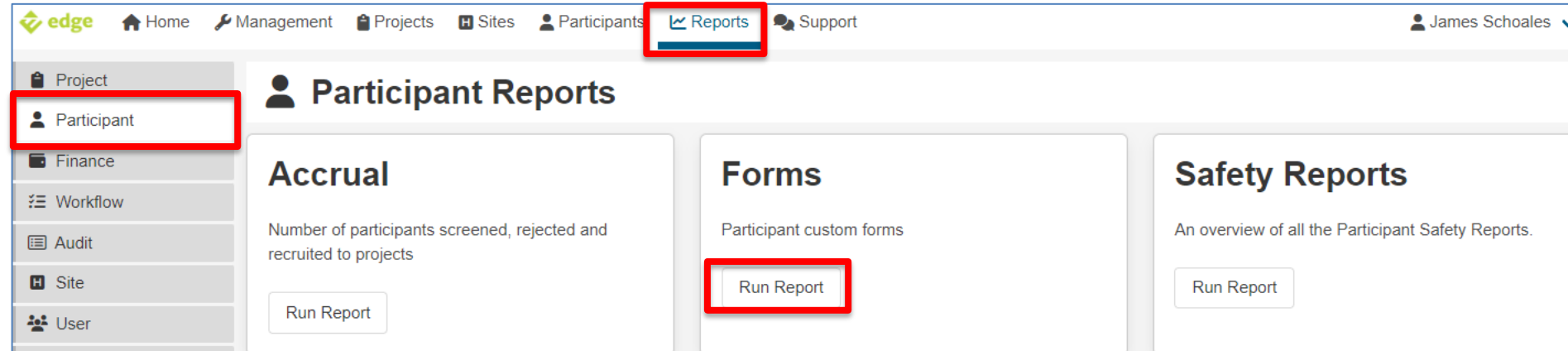
Date Randomised / Recruited Is Greater Than 31/03/2022 x

AND

Date Randomised / Recruited Is Less Than 01/07/2022 x

Report Run Download

Priority Patient Report Navigation



edge Home Management Projects Sites Participants **Reports** Support James Schoales

Project
Participant
Finance
Workflow
Audit
Site
User

Participant Reports

Accrual

Number of participants screened, rejected and recruited to projects

Run Report

Forms

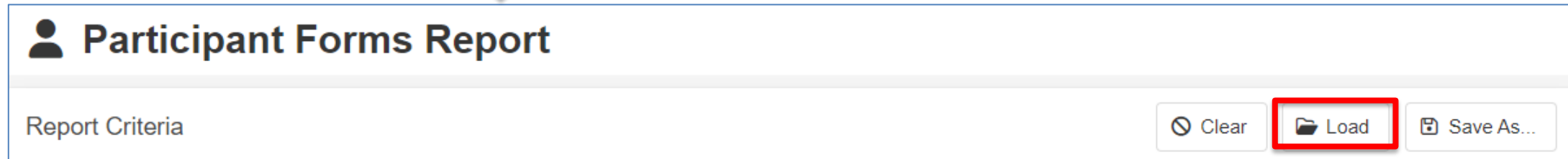
Participant custom forms

Run Report

Safety Reports

An overview of all the Participant Safety Reports.

Run Report




Participant Forms Report


Report Criteria

Clear **Load** Save As...



Load Query

priority  ☐ Limit To My Queries

Public	Name
✓	Priority Patient Report ver 2 

Note: Report name may vary

Priority Patient Report Generation

Participant Forms Report

Report Criteria Priority Patient Report ver 2

Clear

Load

Save

Save As...

Fields

+ Add Field

- Project Site Name
- Project Short Title
- Subject ID
- AYA Patient? (Age 15-39)
- Remote Patient?
- Date Randomised / Recruited
- Date of Remote Access Initiation
- Satellite Site Name
- Type of Satellite Site
- Satellite Site Clinical Trial Conduct
- Remote Access Comments
- Project type

- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x
- Add Filter x

Filters

- Project Type Is Equal To Academic portfolio x
- AND
- Remote Patient? Is Like yes x
- AND
- Date of Remote Access Initiation Is Greater Than 31/03/2022 x
- AND
- Date of Remote Access Initiation Is Less Than 01/07/2022 x
- OR
- Project Type Is Equal To Academic portfolio x
- AND
- AYA Patient? (Age 15-39) Is Like yes x
- AND
- Date Randomised / Recruited Is Greater Than 31/03/2022 x
- AND
- Date Randomised / Recruited Is Less Than 01/07/2022 x

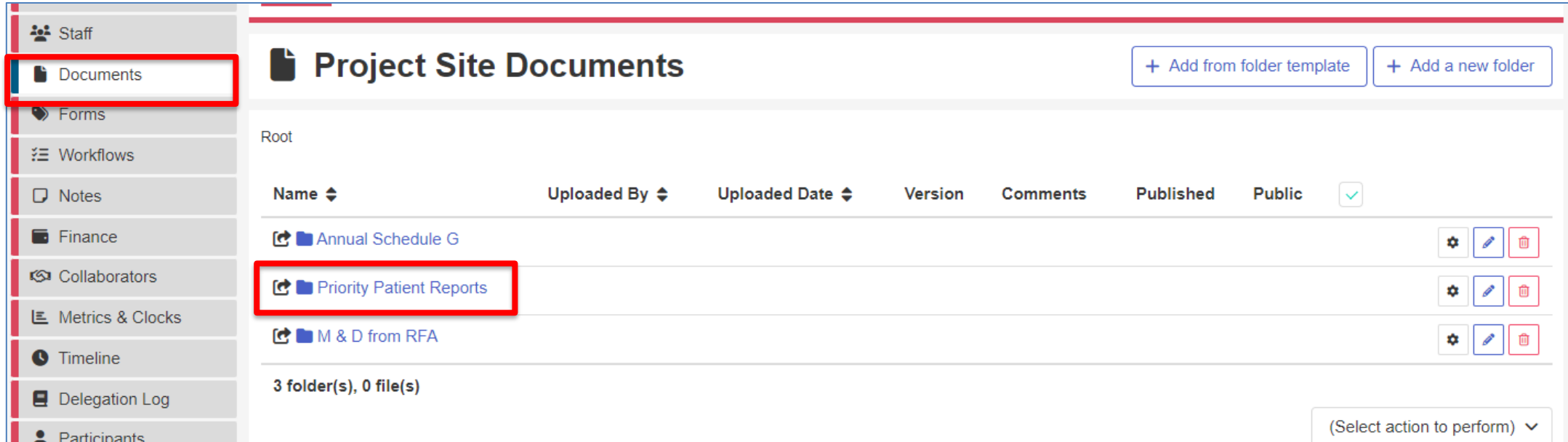
Report

Run

Download

3CTN Priority Patient Reporting

- Under Project Site level for the *3CTN Reporting Y9 for Adult Sites*, or *3CTN Reporting Y9 for Ped Sites* project, as applicable
- Upload your Priority Patient file to the *Priority Patient Reports (site to upload)* folder using *Add file*



Project Site Documents + Add from folder template + Add a new folder

Root

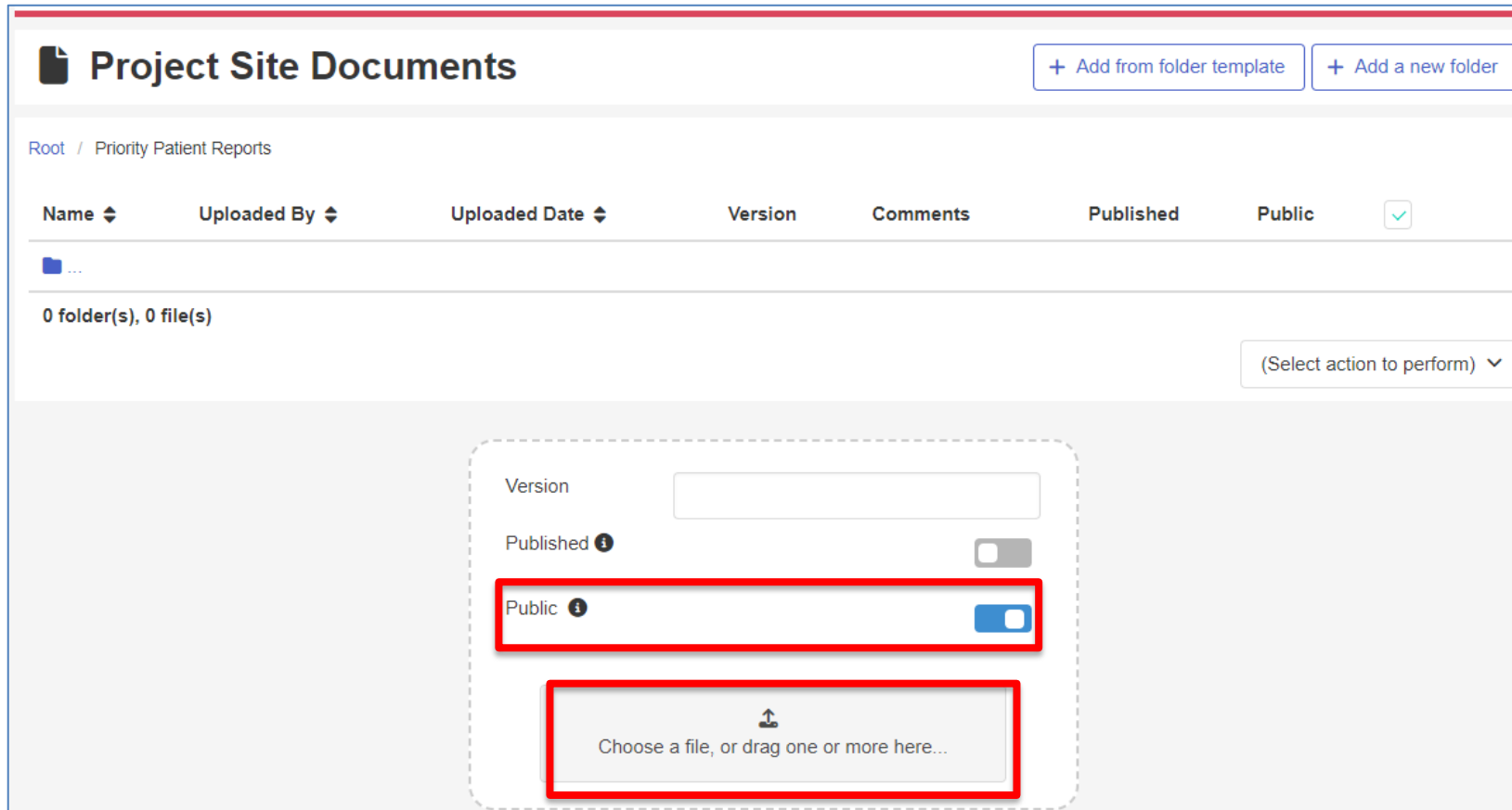
Name	Uploaded By	Uploaded Date	Version	Comments	Published	Public	
Annual Schedule G							
Priority Patient Reports							
M & D from RFA							

3 folder(s), 0 file(s)

(Select action to perform) ▼

3CTN Priority Patient Reporting

- Once in the folder you can drag and drop the file in the grey box or click on the box to use the file finder window to choose the desired file. Make sure to check **Public** to allow 3CTN to see the report.



Project Site Documents + Add from folder template + Add a new folder

Root / Priority Patient Reports

Name	Uploaded By	Uploaded Date	Version	Comments	Published	Public
0 folder(s), 0 file(s)						

(Select action to perform) ▼

Version

Published ☐

Public ☒

M&D Reporting

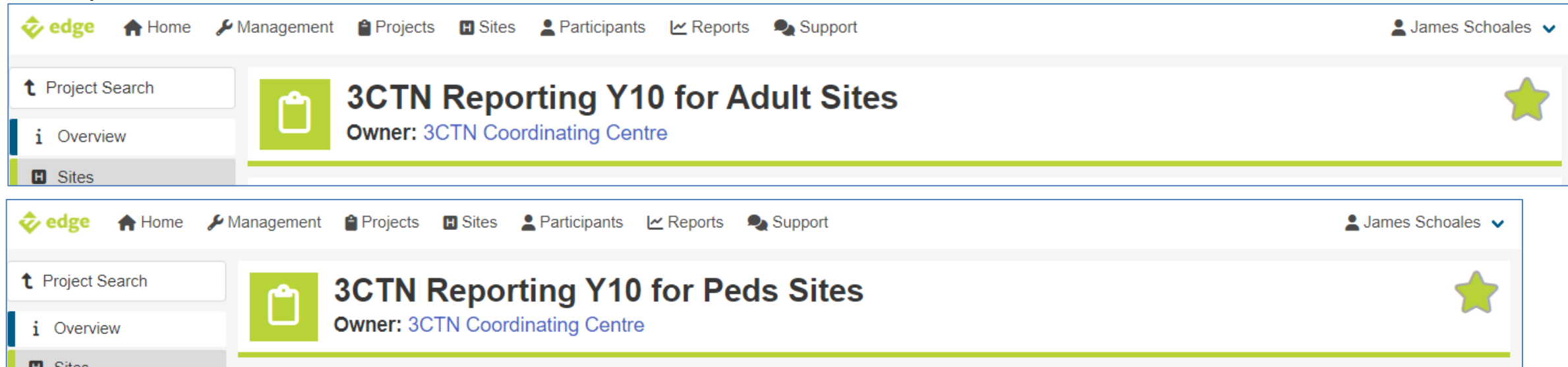
Using EDGE site fields

3CTN Reporting: Y9 (April 2022 – Mar 2022)

Reporting Obligations	Frequency	2014 -2022 Format	2022 Onwards Platform
Milestones and Deliverables	Semi-annually	MS Word	3CTN PORTAL
Schedule G: Annual Progress Report	Annually	EXCEL	3CTN PORTAL

Project for updating M&D and Annual progress will follow the naming convention **3CTN Reporting Fiscal Year Number for Adult Sites** or **3CTN Reporting Fiscal Year Number for Peds Sites**.

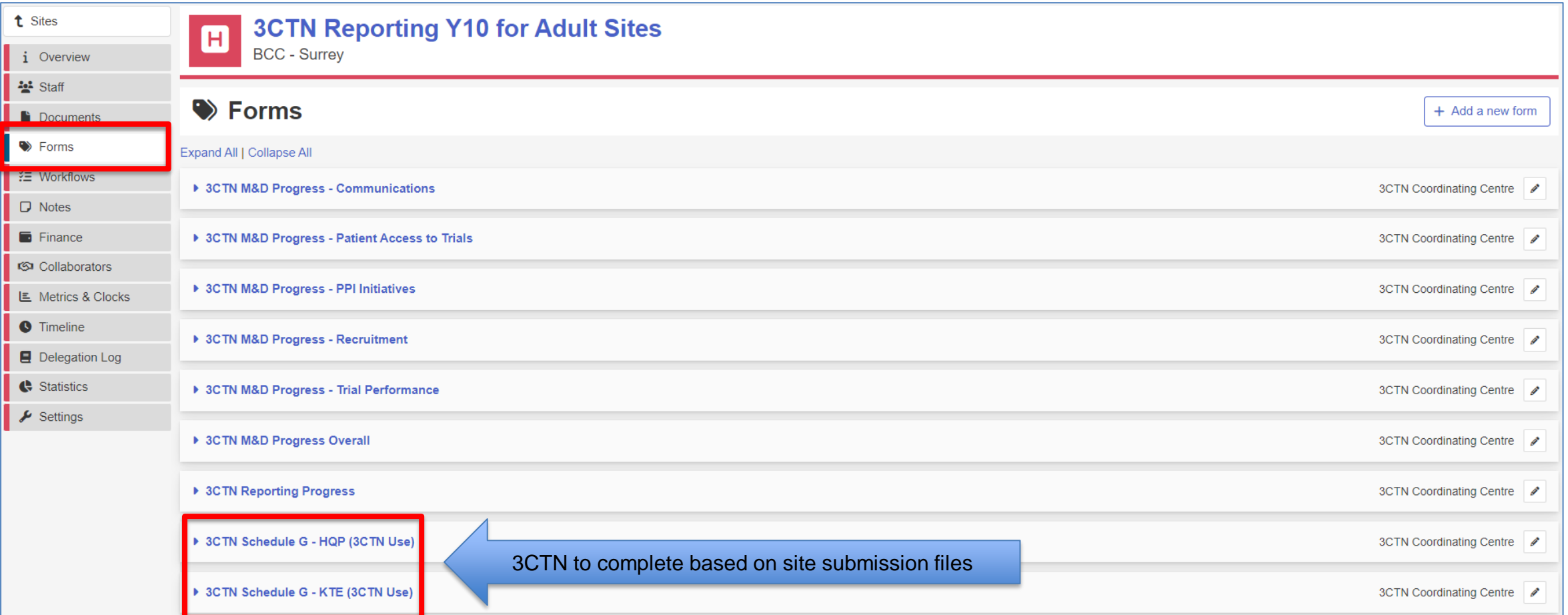
Examples:



The screenshot displays the 'edge' system interface for a project titled '3CTN Reporting Y10 for Adult Sites'. The navigation bar includes links for Home, Management, Projects, Sites, Participants, Reports, and Support. The user 'James Schoales' is logged in. The project page shows a green star icon, the project title, and the owner '3CTN Coordinating Centre'. The left sidebar has tabs for Project Search, Overview, and Sites.

3CTN Reporting – Prefilled information from site M&D










M&Ds can be found at the project site level (Red Banner) of the reporting project under the Forms tab



3CTN Reporting Y10 for Adult Sites
BCC - Surrey

Forms [+ Add a new form](#)


Expand All | Collapse All

▶ 3CTN M&D Progress - Communications	3CTN Coordinating Centre 
▶ 3CTN M&D Progress - Patient Access to Trials	3CTN Coordinating Centre 
▶ 3CTN M&D Progress - PPI Initiatives	3CTN Coordinating Centre 
▶ 3CTN M&D Progress - Recruitment	3CTN Coordinating Centre 
▶ 3CTN M&D Progress - Trial Performance	3CTN Coordinating Centre 
▶ 3CTN M&D Progress Overall	3CTN Coordinating Centre 
▶ 3CTN Reporting Progress	3CTN Coordinating Centre 
▶ 3CTN Schedule G - HQP (3CTN Use)	3CTN Coordinating Centre 
▶ 3CTN Schedule G - KTE (3CTN Use)	3CTN Coordinating Centre 

3CTN to complete based on site submission files

3CTN Reporting – Site to Complete in Q2 and Q4

- Sites
- Overview
- Staff
- Documents
- Forms
- Workflows
- Notes
- Finance
- Collaborators
- Metrics & Clocks
- Timeline
- Delegation Log
- Statistics
- Settings



3CTN Reporting Y10 for Adult Sites

BCC - Surrey

Forms

Expand All | Collapse All

- 3CTN M&D Progress - Communications 3CTN Coordinating Centre
- 3CTN M&D Progress - Patient Access to Trials 3CTN Coordinating Centre
- 3CTN M&D Progress - PPI Initiatives 3CTN Coordinating Centre
- 3CTN M&D Progress - Recruitment 3CTN Coordinating Centre
 - Recruitment Goal 1 Details Target of 100% above pre-3CTN baseline
 - Recruitment Goal 1 Metrics of Success By end of Y10, overall recruitment has reached at least 36% of pre-3CTN baseline (44 patients)- equivalent to 16 patients
 - Recruitment Goal 1 Status Site to complete and add comments below
 - Recruitment Goal 1 Comments
 - Recruitment Goal 2 Details Site Root Cause Analysis
 - Recruitment Goal 2 Metrics of Success By end of Y10, action items have been developed to increase trial accrual.
 - Recruitment Goal 2 Status Site to complete and add comments below
 - Recruitment Goal 2 Comments

+ Add a new form

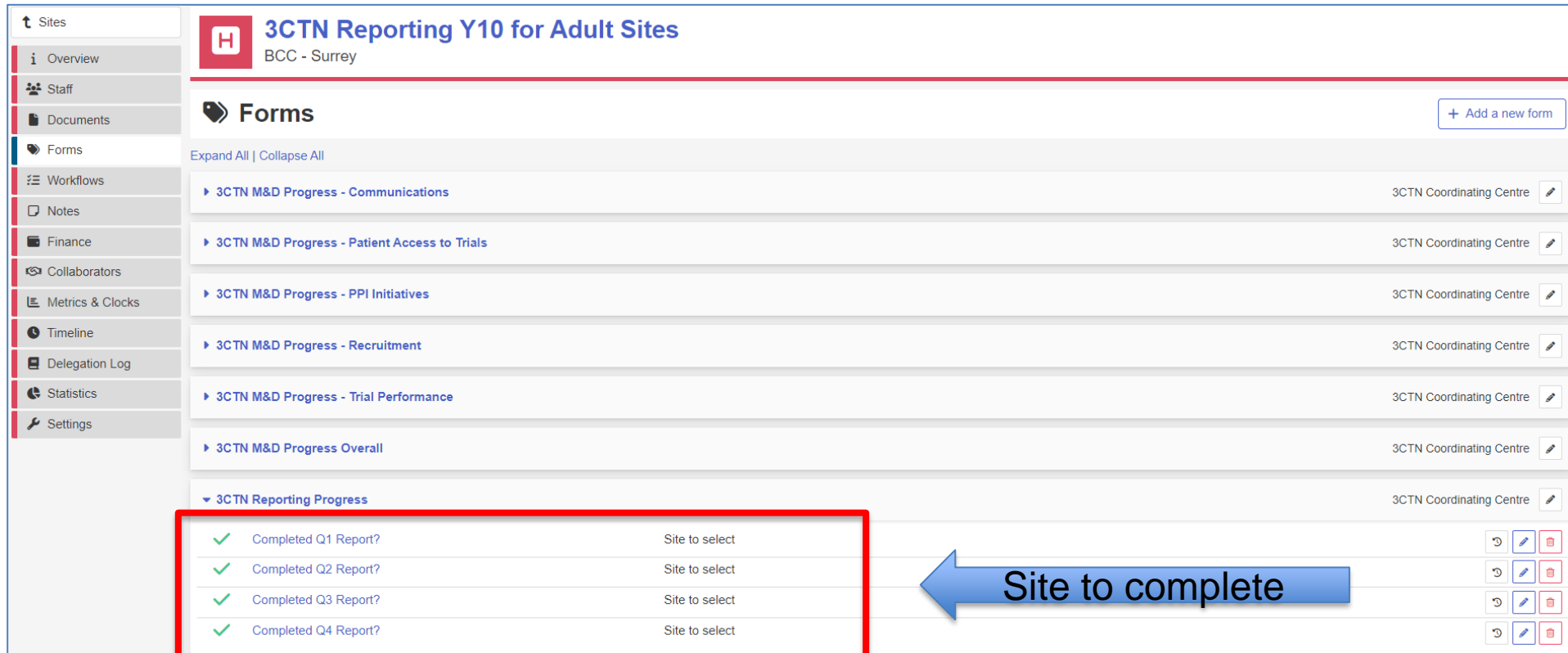
Site to complete in Q2 and Q4

by editing the status and adding comments

Site to complete in Q2 and Q4

3CTN Reporting Progress – Site to complete

Once a site has completed the necessary reporting for the quarter, they need to check of that they have completed the reporting under the **3CTN Reporting Progress** form. This informs 3CTN that the site data is ready to be pulled.



3CTN Reporting Y10 for Adult Sites
BCC - Surrey

Forms [+ Add a new form](#)

Expand All | Collapse All


- 3CTN M&D Progress - Communications 3CTN Coordinating Centre
- 3CTN M&D Progress - Patient Access to Trials 3CTN Coordinating Centre
- 3CTN M&D Progress - PPI Initiatives 3CTN Coordinating Centre
- 3CTN M&D Progress - Recruitment 3CTN Coordinating Centre
- 3CTN M&D Progress - Trial Performance 3CTN Coordinating Centre
- 3CTN M&D Progress Overall 3CTN Coordinating Centre
- 3CTN Reporting Progress** 3CTN Coordinating Centre

✓ Completed Q1 Report?	Site to select	🔍 ✎ 🗑️
✓ Completed Q2 Report?	Site to select	🔍 ✎ 🗑️
✓ Completed Q3 Report?	Site to select	🔍 ✎ 🗑️
✓ Completed Q4 Report?	Site to select	🔍 ✎ 🗑️

3CTN Reporting – Site to Complete

Sites are to check off which elements of reporting have been completed

Note: The NA options are to be used when there is no update or nothing to report

 Edit Field

Completed Q2 Report?

☐ Site to select

☒ Patient recruitment updated

☐ Patient recruitment NA

☒ Trial performance key dates updated


☐ Trial performance key dates NA


☐ AYA and remote access patient file uploaded

☒ AYA and remote access patient file NA

☒ M&D Reported

Notes

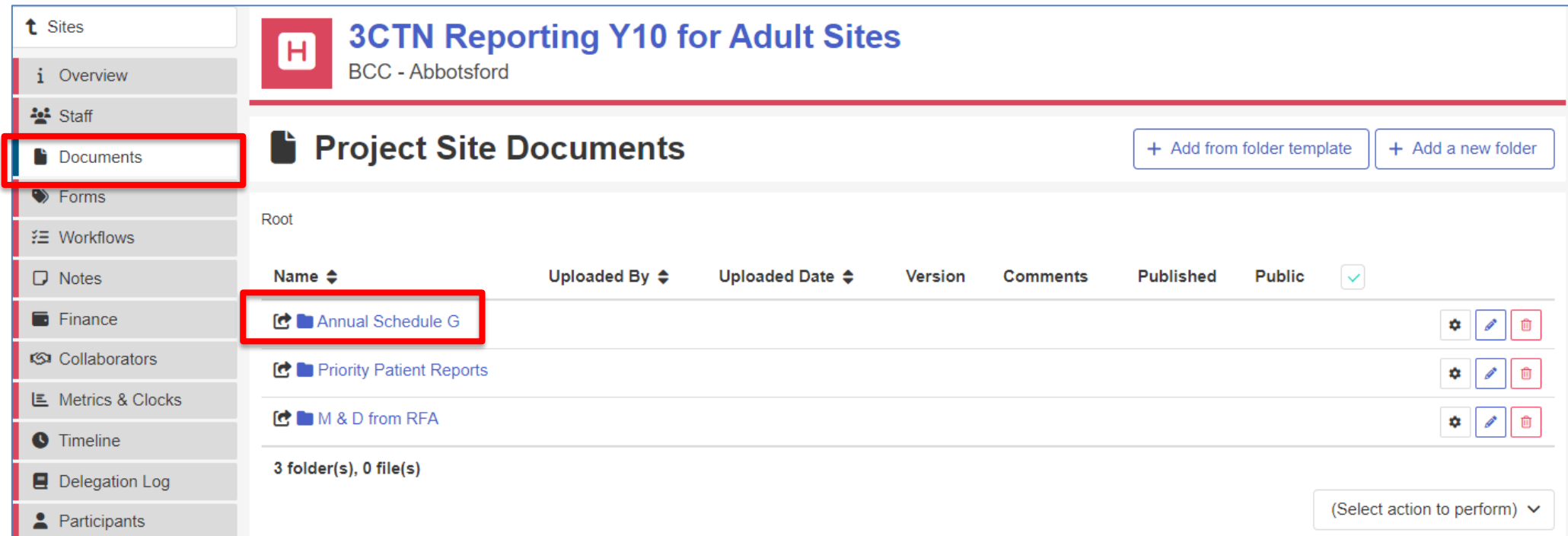
 Save

 Cancel

Schedule G Reporting

Document Upload

- Schedule G reporting templates will be attached to the Q4 reporting reminder emails
- Sites are to complete the excel template and upload the completed excel to the Annual Schedule G folder at the project site level of the reporting project

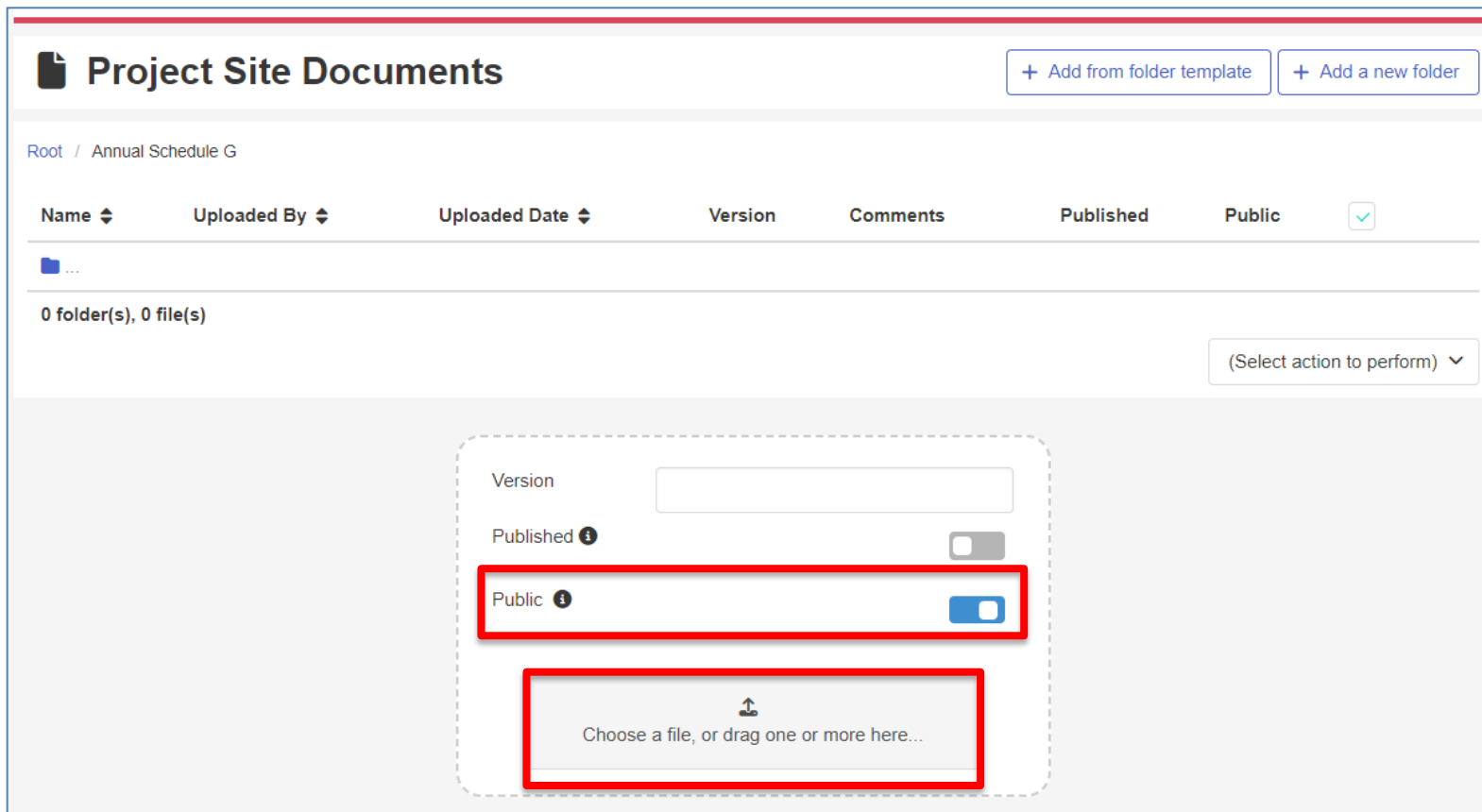


The screenshot displays the '3CTN Reporting Y10 for Adult Sites' interface for the 'BCC - Abbotsford' project. On the left sidebar, the 'Documents' menu item is highlighted with a red box. The main content area, titled 'Project Site Documents', shows a list of folders under the 'Root' directory. The 'Annual Schedule G' folder is highlighted with a red box. The list includes three folders: 'Annual Schedule G', 'Priority Patient Reports', and 'M & D from RFA'. At the bottom, it indicates '3 folder(s), 0 file(s)' and a dropdown menu for '(Select action to perform)'.

Name	Uploaded By	Uploaded Date	Version	Comments	Published	Public
Annual Schedule G						
Priority Patient Reports						
M & D from RFA						

Schedule G Reporting

- Once in the folder you can drag and drop the file in the grey box or click on the box to use the file finder widow to choose the desired file. Make sure to check **Public** to allow 3CTN to see the report.



Project Site Documents + Add from folder template + Add a new folder

Root / Annual Schedule G

Name	Uploaded By	Uploaded Date	Version	Comments	Published	Public
0 folder(s), 0 file(s)						

(Select action to perform) ▼

Version

Published ☐

Public ☒

Choose a file, or drag one or more here...