1. Login Page

- Email address 1
  - New user: Enter the email address provided by your institution
  - Returning user: Enter the email address used to setup your account

- Password 2
  - New user: Leave blank and click on “New User”
  - Returning user: Enter your password
2. Landing Page after Login
(Note: Return to this page from anywhere in the RMS by clicking ‘requests’ in the banner section located on each page.)

- **Request Tab 1**
  - Landing page after login
  - **Request ID 2**: Enter the request id you would like to query
    - **Requester 3**: Enter the first OR last name of the requester and click ‘go.’
      If the first or last name isn’t unique, the query returns a list of all matches.
    - **Expert 4**: Enter the first OR last name of the consultation expert and click ‘go.’
      If the first or last name isn’t unique, the query returns a list of all matches.
  - Click desired request for details 6
Update displayed fields as required – BE SURE to click ‘save changes’ once the updates have been entered and select who should receive the email notification of the changes.

- **Comments 1:** Anyone can add a comment to the request. At the top of the request, click ‘add comment.’

Once comment is complete, check who should receive an email notification and then submit. (Note: The requester may want to give additional information. The consultation expert may want to record progress of the request.)

- At the top of the request, click ‘create task’ to forward this request to add another task to the request.

- At the top of the request, click ‘add attachments’ to add a document to the request. If there is already an attachment present, click ‘add/get attachments’ to add another attachment, delete an attachment, or to access an attachment.
• **New Request Tab**
  1. Click if entering a new request
  2. **Requester**: Name of the PI (Note: If the PI isn’t the primary contact, the primary contact (e.g., fellow, resident, medical student, research personnel) and contact info should be entered as the first line of the “Summary” section. The PI is the person listed in the Annual Progress Report to the NIH.
  3. **Created by**: This field is not shown when completing a new request. However, once the request is submitted, the person who is logged into the RMS will be displayed in this field.
  4. **Title**: Please enter the title of the study. (Note: Some cores have a standard format for entering this field. If information is added to the title, please do not modify it.)
  5. **Grant Number**: If applicable, enter the grant number associated with this request.
o **IRB Number 5**: If applicable, enter the IRB number for this study.

o **IRB Institution 6**: Default is Case Western Reserve University. Click “change” to change the default.

o **Desired consultations 7**: Select the applicable core(s) after clicking ‘choose’ and then select the task needed from the drop down. Multiple core(s) and task(s) can be selected. If you are unfamiliar with the CTSC cores, please click ‘learn about the CTSC cores’ 8 to link to the website section that describes the cores.

o **Summary 9**: Summarize the study and what is needed. What is needed can be as simple as “I need help getting the study started.” If the primary contact isn’t the requester, the first line(s) of the summary should be the primary contact info.

o **Expected Ultimate Outcome(s) 10**: Ultimately what do you plan to achieve with your request (e.g., a manuscript) and not steps along the way (e.g., data collection). More than one box may be checked.

o **Co-investigators 11**: Enter your co-investigators in this section, if applicable. Follow the naming convention in this field.

o **Notify 12**: Located above the ‘Research Details’ section, specify who you would like to notify about your request. The default is for the requester and all consultation experts to receive an email notification. Uncheck either or both boxes to change the default.

- **Bulk attributes update**: See user manual or contact ctsc-research-concierge@case.edu.
3. Banner Section of each RMS page

- **Requests 1**: See item 2 above.
- **Reporting 2**: See user manual or contact ctsc-research-concierge@case.edu.
- **Users and Proxies 3**: List of active and inactive users, create new users, and define proxies.
- **Cores 4**: List of cores and tasks provided by cores. In addition, tasks can be managed by the cores.
- **My Account 5**: Maintains contact information for the user who is logged in and allows user to change password.
- **Log out 6**: Logs user out of the RMS.
- **Change log … 7**: Itemizes the changes made since the last RMS release.
- **Quick Start Guide 9**: This document, a brief intro to the fields the end user can complete.