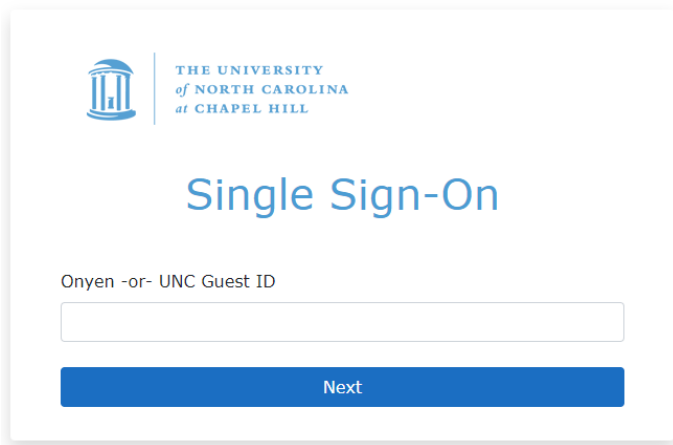


How to Create and Update 'My Profile' in the UNC SOM Profile & Training System (PaTS)

1. Navigate to the UNC SOM Profile & Training System by clicking the link below.

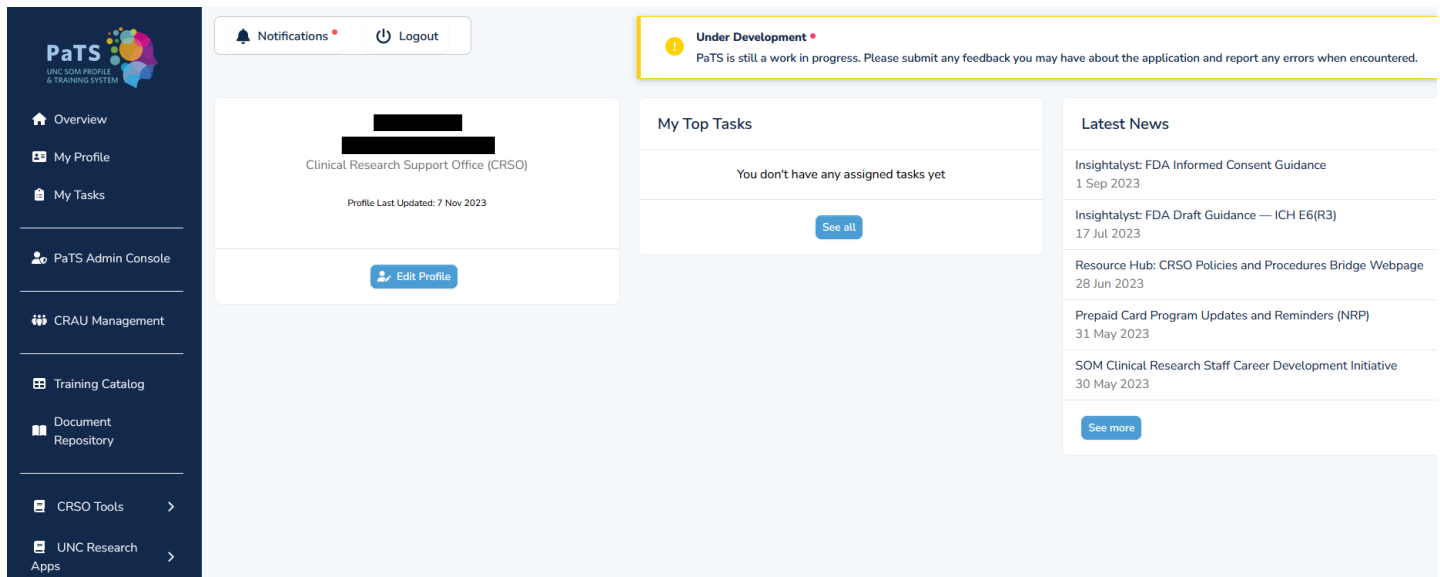
Profile & Training System (PaTS): crso.unc.edu/pats

2. The UNC Single Sign-On will appear, log in using your UNC credentials/onyen.



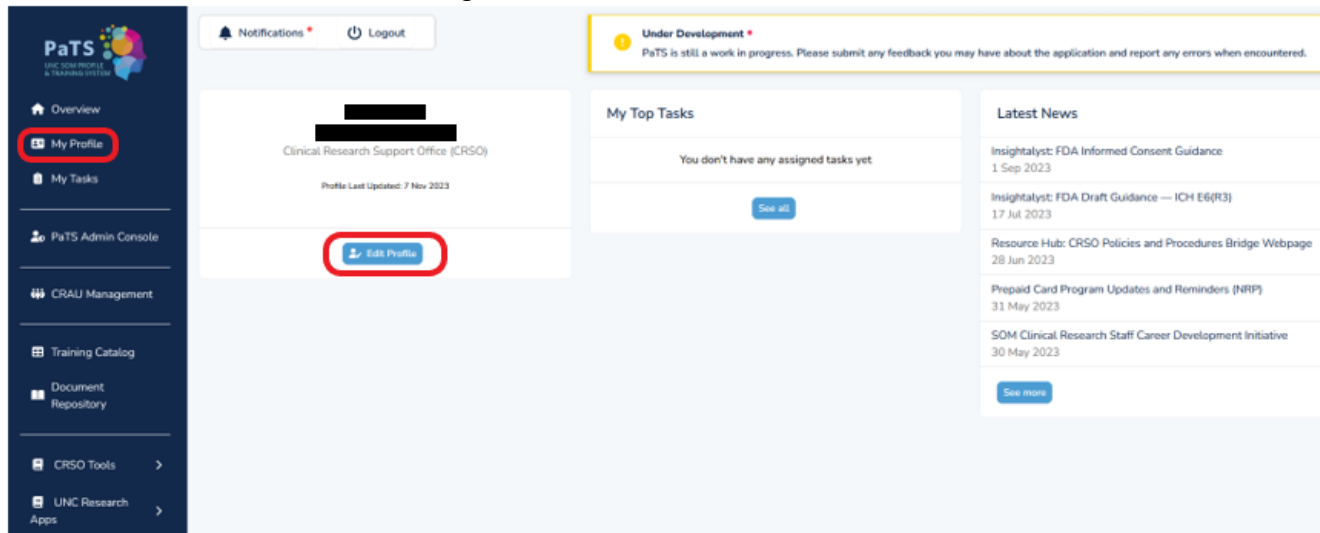
The image shows the UNC Single Sign-On login page. At the top left is the UNC logo and the text "THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL". Below this is the heading "Single Sign-On". Underneath is a text input field labeled "Onyen -or- UNC Guest ID". At the bottom is a blue button labeled "Next".

3. Once you log in, you will be routed to the PaTS home page that provides your UNC directory information, your top tasks, and the latest announcements from the CRSO website. Access other parts of PaTS using the vertical navigation bar on the left-hand side of the home page.



The image shows the PaTS home page dashboard. On the left is a dark blue vertical navigation bar with the PaTS logo and the following menu items: Overview, My Profile, My Tasks, PaTS Admin Console, CRAU Management, Training Catalog, Document Repository, CRSO Tools, and UNC Research Apps. The main content area has a light blue background. At the top right, there are "Notifications" and "Logout" buttons. Below this is a yellow banner with a warning icon and the text "Under Development" and "PaTS is still a work in progress. Please submit any feedback you may have about the application and report any errors when encountered." The dashboard is divided into three main sections: 1. A central profile section for "Clinical Research Support Office (CRSO)" with a redacted name and a "Profile Last Updated: 7 Nov 2023" note, and an "Edit Profile" button. 2. A "My Top Tasks" section with the message "You don't have any assigned tasks yet" and a "See all" button. 3. A "Latest News" section with a list of announcements: "Insightalyst: FDA Informed Consent Guidance" (1 Sep 2023), "Insightalyst: FDA Draft Guidance — ICH E6(R3)" (17 Jul 2023), "Resource Hub: CRSO Policies and Procedures Bridge Webpage" (28 Jun 2023), "Prepaid Card Program Updates and Reminders (NRP)" (31 May 2023), and "SOM Clinical Research Staff Career Development Initiative" (30 May 2023). A "See more" button is at the bottom of the news section.

4. To create or update your “My Profile”, click the Edit Profile button from the home page or the My Profile header on the PaTS navigation bar.



5. The My Profile page holds your UNC and Research Profile. Your UNC Profile provides information about you from the UNC Directory. Your Research Profile has information provided by you about your Roles and Responsibilities.

My UNC Profile
Information in this section is pulled directly from UNC Directory

My Research Profile
Information in this section is provided by you based on your job activities and requirements

6. If the information in your UNC Profile is incorrect, click the blue button labeled “Is this information incorrect?” to request any corrections.

The screenshot shows the 'My UNC Profile' section of the PaTS interface. It displays the user's name (redacted), department (Clinical Research Support Office (CRSO)), supervisor (redacted), and CRAU information (stating no CRAU is currently assigned). A blue button labeled 'Is this information incorrect?' is visible. Overlaid on this is a 'Report Incorrect Profile' modal form. The form contains fields for 'ONYEN Username' and 'Email Address' (both redacted). It includes a section 'Which information is incorrect?' with radio buttons for Title, Department, Supervisor, and Other. Below this is a text area for 'Let us know the correct information' with a red border and a required field indicator. At the bottom of the modal is a 'Submit' button.

7. To create or update your Research Profile, select the blue Edit Profile button that appears under either Roles or Responsibilities.

My Research Profile

Information in this section is provided by you based on your job activities and requirements

Roles

Please select the title that best describes your primary role in clinical research (note, this may not exactly align with your position classification, but should be based on your general working title and/or responsibilities)

Program Director/Manager or Project Manager

Are you currently certified as a clinical research professional? (investigator or staff)

None

Are you currently a member of a clinical research professionals organization? (investigator or staff)

Neither

Edit Profile

Responsibilities

Investigator responsibilities (principal investigator or co-investigator only)

None

Responsibilities related to participant interactions (investigator or staff)

Obtain informed consent from research participant

Research data responsibilities (investigator or staff)

None

Responsibilities related to collecting, handling, and/or managing bio-specimens (investigator or staff)

None

Project management responsibilities (investigator or staff)

None

Regulatory responsibilities (investigator or staff)

None

Research financial management responsibilities (investigator or staff)

None

Staff hiring and/or training responsibilities (investigator or staff)

None

General research management (investigator or staff)

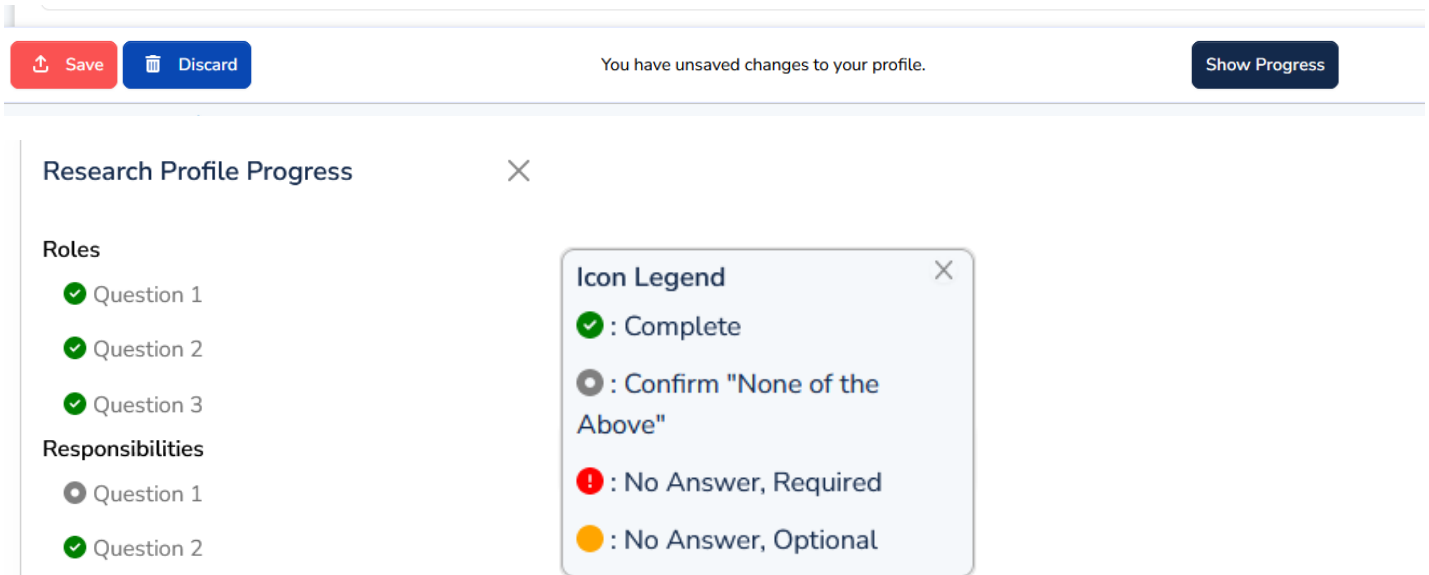
None

Edit Profile

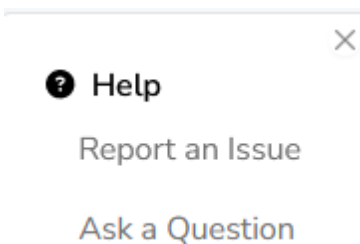
8. Upon selecting Edit Profile, your Research Profile will open. Provide a response or edit previous responses to each of the prompts for Roles and Responsibilities. Your responses will determine the tasks assigned to you via PaTS. For any new tasks, you will receive automated emails from PaTS.

9. Once your profile is complete, click the Save button to save your responses. The Discard button will undo any selections you have made.

The Show Progress button will open a side panel to illustrate the status of each question. An Icon Legend is available at the bottom of this panel to describe the question icons that appear next to the question numbers.



10. For questions or feedback related to PaTS, select the Help tab at the bottom right-hand side of your screen.



To learn more about viewing and attesting to documents in PaTS see
Instructions for Viewing and Attesting to Documents in PaTS
available on the CRSO Website.