

# Cheat Sheet for Investigative Sites

The Oracle Life Sciences Site Select site portal is a web-based tool that provides access to your site feasibility to-do list, a comprehensive messaging area, the site profile, and a document library containing all files shared with the CRO or sponsor. You can use the portal to check your tasks and study status anytime, from anywhere.

## GETTING STARTED

To get started, check your email for an invitation. There are two ways to access the site portal:

- **No login required:** No need to remember a password. Click the encrypted link for secure access. The link expires after 60 days.
- **Log in required:** Provides access to all studies you have been invited to participate in. Click the Log in required link to set a password for your account. If you forget your password, use the reset password link to receive an email with a link to reset your password.

## DASHBOARD

If you're logged in to the site portal and you've been invited to more than one study, use the **myStudies** feature to switch between them. This allows you to view tasks and details specific to each study. Click myStudies in the page header to open your dashboard.

Initially, the study list sorts by invitation date, with the most recent at the top. By default, Closed studies are hidden. You can manually adjust the filter to include Closed studies and optionally sort the table by study name, current task, invitation date, or workflow close date. Note that while you can still view studies that are in Closed or Cancelled status, you won't be able to edit tasks because the workflows are closed.

Click the name of the study you want to view. The study's name will appear in the page header, and you'll see the study's task list on the Home page.

If preferred, you can also choose a study using the study drop down in the page header.

The screenshot shows the 'myStudies' dashboard. At the top, there's a breadcrumb trail: 'myStudies > mmorala > AS\_RO\_50 - Robert Beanlands'. On the right, there's a user profile 'Hello, Robert' and a 'Close' button. Below the header, a message states: 'Below is a list of all the studies you have been invited for feasibility across all sites in which you are a user. This means your email address may be affiliated with study sites from different principle investigators. Each study is assigned a workflow of tasks related to their feasibility.' Below this message are three search filters: a 'search' input, an 'organization' input, and a 'study status' dropdown menu with 'Active x' and 'Closed x' options. The main content is a table with the following columns: 'Study name', 'Current task', 'Invitation date', and 'Workflow close'. The table lists three studies:

Study name	Current task	Invitation date	Workflow close
AS_RO_50 mmorala	Enter estimated patient count	21May2025	
AS_SELECT_43 mmorala	Complete - no tasks due	22Oct2024	
AS_SELECT_23 mmorala	Complete - no tasks due	30Jun2023	

# HOME PAGE

The home page has a vertical list of completed and upcoming tasks and milestones on the left side of the page. To complete a task, take the **Task action** shown on the right. Each task includes a color-coded status so you can quickly see its progress:

- Green: Completed
- Orange: Pending (in progress)
- Yellow: Current task
- Pink: Discontinued
- Blue: Not started

Your CRO or sponsor may also choose to include:

- Extra study information that displays above the task list
- Additional details for each task that displays just below the task name on the right

The CRO or sponsor may also include a brief study description at the top of the home page. If available, this text appears above the task list and may include a document download icon for more information. Not all studies include this description or document, and it's not a concern if it isn't provided with the study you're viewing.

You can return to this page anytime by clicking the Oracle logo in the upper left corner of any page.

**Note:** You may be working on more than one study with your CRO/sponsor. Make sure to check the study name at the top of your screen before you begin your work.

The screenshot shows the Oracle myStudies interface. At the top, there's a navigation bar with 'myStudies', 'Oracle Admin', and 'Sample Study - Eunice Wang'. A user profile 'Hello, Eunice' is visible in the top right. Below the navigation, there's a placeholder for optional text about the study workflow. The main content area is divided into two columns. The left column, titled 'Your study workflow tasks', features a status summary table and a list of tasks. The status summary table shows: Completed (1), Pending (0), Current task (1), Discontinue (0), and Incomplete (6). The task list includes: 'Agree to confidentiality statement' (Completed), 'Verify site profile information' (Current task), 'Sign and return CDA' (Assigned: -), 'View protocol' (Assigned: -), 'Verify site interest' (Assigned: -), 'Complete feasibility survey' (Assigned: -), 'Verify site interest again' (Assigned: -), and 'Enter date available for site visit' (Assigned: -). The right column, titled 'Verify site profile information', shows 'Task information' (Please review site profile information for accuracy and update as necessary.) and 'Task actions' (Verify site profile information). A 'Task age 1 day' indicator is present in the top right of this section. The Oracle Life Sciences logo is at the bottom left.

Completed	Pending	Current task	Discontinue	Incomplete
1	0	1	0	6

## TASK LIST

Each task you need to complete includes a detail panel on the right side of the screen. This panel shows information and actions related to the task. Depending on what's required, you can view and download files, click Yes or No buttons, upload documents, and click Submit when you're ready.

Your CRO or sponsor sets the required tasks and the order in which you'll complete them. Examples of tasks you might be assigned include:

- Verify site profile information
- Agree to a confidentiality statement
- View protocol
- Verify site interest
- Complete feasibility survey
- Enter estimated patient count
- Sign and return CDA
- Review and return a document
- Enter date available for site visit



If you've already completed your tasks, you can return at any time to review them. Action controls will be disabled for all completed tasks except for feasibility surveys, which you can Edit as necessary. You can still download templates and documents if available.

When the study workflow window hasn't expired and you've finished some tasks but not others, you can review what you've completed and click the next task due to continue working through the study workflow.

If you provide a disqualifying response to one of the tasks and that response prevents you from continuing with the study, you'll see a message at the top of the task details and the task will change to red (Discontinue) status.

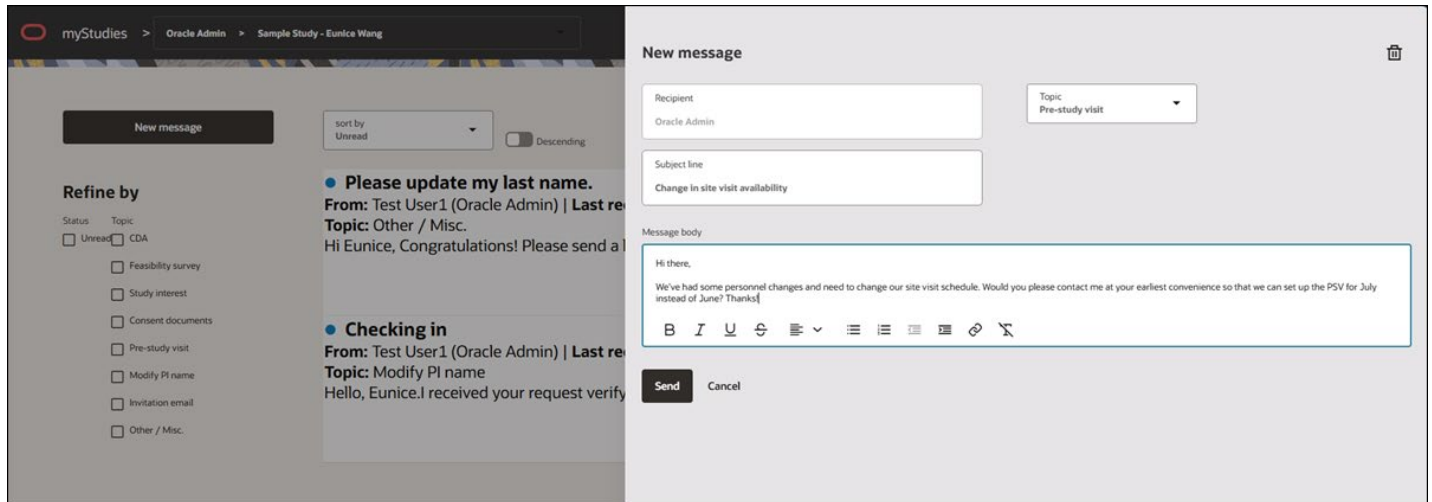
The screenshot displays the myStudies interface. At the top, the navigation bar shows 'myStudies > mmorala > AS\_RO\_50 - Robert Beanlands'. A user profile 'Hello, Robert' is visible in the top right. The main content area is divided into two sections. On the left, 'Your study workflow tasks' shows a summary of task counts: Completed (2), Pending (0), Current task (0), Discontinue (1), and Incomplete (0). Below this, a list of tasks is shown: 'View protocol' (Completed), 'Verify site interest' (Discontinue), and 'Enter estimated patient count' (Completed). The 'Verify site interest' task is highlighted in red. On the right, the detailed view for 'Verify site interest' is shown. It includes a yellow warning banner: 'Your response to the current task is preventing you from continuing on with this study. If you would like to resume participation, please accept the terms of the current task.' Below this, the task name 'Verify site interest' is displayed with a 'Task age 9 days' indicator. The 'Task information' section is empty. The 'Task actions' section shows radio buttons for 'Yes' and 'No', with 'No' selected. A 'Done' button is located at the bottom right of the task details panel. The Oracle Life Sciences logo is visible in the bottom left corner of the interface.

## VIEW COMMUNICATIONS WITH YOUR SPONSOR OR CRO

To view your full message history with the sponsor or CRO, click the menu icon  in the upper right corner of your screen and select **messaging**. You can also click the message icon  in the header to open the page. If you have any unopened messages, a badge on the message icon will show the number waiting.

When the Messaging page opens, it sorts unread messages to the top. You can adjust the view using the sorting controls, and filter the message list using the Refine by options. Click any message in the list open it in a modal window.

You can also create a new message from this page. Click **New message** to open a drawer from the right side of your screen where you can compose and send the message.



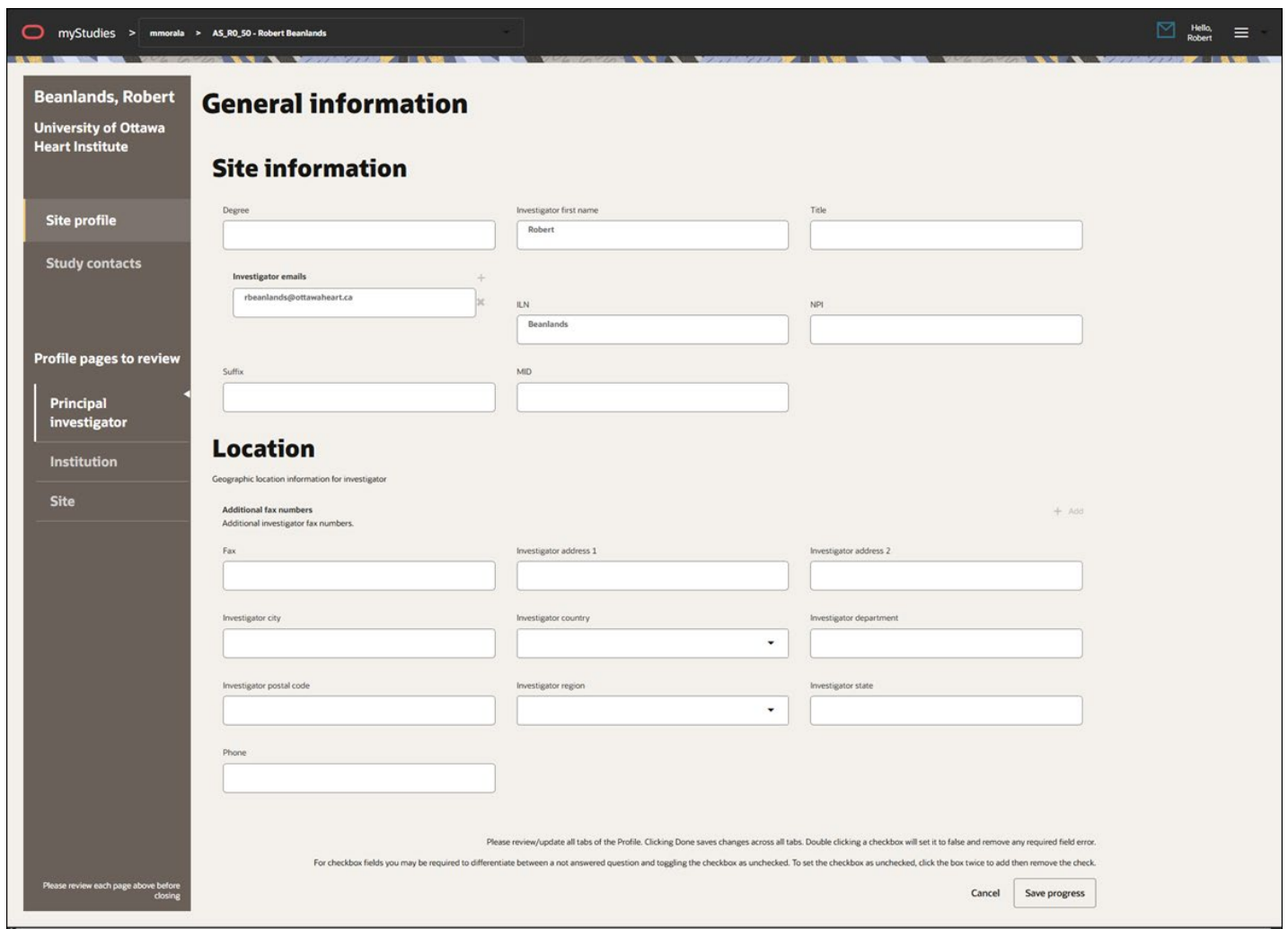
The screenshot displays the 'myStudies' messaging interface. On the left, a 'Refine by' sidebar allows filtering by status (Unread, CDA) and topic (Feasibility survey, Study interest, Consent documents, Pre-study visit, Modify PI name, Invitation email, Other / Misc.). The main message list shows two entries: 'Please update my last name.' and 'Checking in', both from 'Test User1 (Oracle Admin)'. A 'New message' modal is open on the right, featuring a 'Recipient' dropdown (Oracle Admin), a 'Topic' dropdown (Pre-study visit), a 'Subject line' field (Change in site visit availability), and a 'Message body' text area with a rich text editor. The modal includes 'Send' and 'Cancel' buttons.

# UPDATE THE SITE PROFILE

Each CRO/Sponsor within Select maintains a profile for your site. To view and manage your site profile, click the menu icon  at the upper right of your screen and choose **edit site profile**. If the link isn't enabled in the menu, your CRO or Sponsor has intentionally disabled editing and will manage any updates. Please contact them with any questions.

If you have created a site portal account, then the study picker in the page header will allow you to switch between CRO/Sponsors based on who is managing the study. Make sure to review and update each profile page and scroll to the bottom to **Save progress** as you go.

If you want someone on your team to work with the CRO/sponsor in the site portal, add their information and email address in the "Site" sub-tab. The new contact will receive an email with a link to login.



myStudies > mmorala > AS\_RO\_50 - Robert Beanlands Hello, Robert

**Beanlands, Robert**  
University of Ottawa  
Heart Institute

**General information**

**Site information**

Degree

Investigator first name

Title

Investigator emails

ILN

NPI

Suffix

MID

**Location**

Geographic location information for investigator

Additional fax numbers   + Add

Additional investigator fax numbers.

Fax

Investigator address 1

Investigator address 2

Investigator city

Investigator country

Investigator department

Investigator postal code

Investigator region

Investigator state

Phone

Please review/update all tabs of the Profile. Clicking Done saves changes across all tabs. Double clicking a checkbox will set it to false and remove any required field error.

For checkbox fields you may be required to differentiate between a not answered question and toggling the checkbox as unchecked. To set the checkbox as unchecked, click the box twice to add then remove the check.

Please review each page above before closing

## MANAGE DOCUMENTS

To view and manage your documents, click menu icon (☰) at the upper right of your screen and choose **documents**. You'll see two tabs on this page, **Study documents** and **Library documents**. Access to Library documents is available only if you have logged in to the site portal.

On the Study documents tab, you can manage all the documents exchanged in a study (e.g., all CDA versions, protocol and other study documents exchanged with the CRO/sponsor, feasibility survey questionnaire PDF, and your completed survey). Click the document name to open the details drawer, where you can review the related task history and download the document.

If your CRO/Sponsor activated the optional Investigator library, and you've logged into the Site portal, you can manage those documents under the Library documents tab. The library stores investigator documents at the global account level so they can be re-used across studies (e.g., privacy consents, data use consents, master CDA etc.). If you have access to the Library documents tab, click the Document label to open the details drawer.

myStudies > mmorala > AS\_SELECT\_25 - Robert Beanlands

Documents

On this page there are 2 tabs. The documents related to the current study are listed in the first tab "Study documents".

Library documents are study documents that have been flagged as re-useable across studies offered by a CRO or Sponsor. Libraries are not shared across CRO/Sponsors so you may see a different set of library documents based on the CRO or Sponsor that has invited you to studies in Select.

Study documents **Library documents**

Below is a list of workflow documents completed for this study.  
Clicking on the document name will expand further details on the document submission including document version history and the ability to download copies of the document.

Document	Completed on	Completed by	Version status	Response
Protocol	30Jun2023	Robert Beanlands	Downloaded	
Confidentiality statement	30Jun2023	Robert Beanlands	Downloaded	

myStudies > Oracle Admin > Sample Study - Sergio Giralt

Documents

On this page there are 2 tabs. The documents related to the current study are listed in the first tab "Study documents".

Library documents are study documents that have been flagged as re-useable across studies offered by a CRO or Sponsor. Libraries are not shared across CRO/Sponsors so you may see a different set of library documents based on the CRO or Sponsor that has invited you to studies in Select.

Study documents **Library documents**

Below is a list of workflow documents completed for this study.  
Clicking on the document name will expand further details on the document submission including document version history and the ability to download copies of the document.

Document	Completed on	Completed by	Version status
CDA	12Jun2025	Test User 1	Approved
Generic Document A	12Jun2025	Sergio Giralt	Downloaded
Generic Document B	12Jun2025	Sergio Giralt	Downloaded

**CDA**

Review the document version history below. A document's previous versions can be invalidated except the active/submitted version.

**Task history**

V2 [CDA 999-9999.docx](#) Approved

Completed on: 12Jun2025 by Test User 1

V1 [999-9999 CDA with merge fields.docx](#) Downloaded

Completed on: 12Jun2025 by Sergio Giralt

myStudies > mmorala > AS\_SELECT\_25 - Robert Beanlands

Documents

On this page there are 2 tabs. The documents related to the current study are listed in the first tab "Study documents".

Library documents are study documents that have been flagged as re-useable across studies offered by a CRO or Sponsor. Libraries are not shared across CRO/Sponsors so you may see a different set of library documents based on the CRO or Sponsor that has invited you to studies in Select.

Study documents **Library documents**

Below is a list of documents that have been saved to the document library for **Robert Beanlands** and **University of Ottawa Heart Institute**.  
The documents are available for re-use across studies only by study teams associated with **mmorala**.  
The study team can reference and manage these documents, and Select uses Active documents to auto-complete workflow tasks when applicable.  
Changes made to a document in the library will not affect documents submitted to the current study's workflow tasks. To affect a document submission for a particular study, please use the "Study documents" tab.

Scope	Document label	Completed on	Completed by	Document status	Response
	AS_DR	28May2025	Mr Ankit Sharma	Active	

## COMPLETE FEASIBILITY SURVEYS

Your sponsor or CRO may assign you a feasibility survey task, which appears in the task list on the home page. If you need to update your answers and resubmit, click the Edit link next to the survey item in the task list or choose Edit survey response in the Task actions section.

You can also collaborate with your teammates to complete the survey. Your responses are saved automatically, so you can exit at any time and return to the survey later from the site portal.

### Your study workflow tasks

<b>Completed</b> 3	<b>Pending</b> 0	<b>Current task</b> 1	<b>Discontinue</b> 0	<b>Incomplete</b> 3
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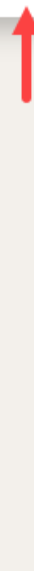
- [Verify site profile information](#)  
Assigned: 27Jul2020
- [Sign and return CDA PLS/Sites](#)  
Assigned: -
- [Generic Document PTS\Sites](#)  
Assigned: -
- [View protocol](#) ✓  
Assigned: 31Mar2021  
Completed: 31Mar2021 By John Smith
- [Verify site interest](#) ✓  
Assigned: 31Mar2021  
Completed: 31Mar2021 By John Smith
- [Complete feasibility survey](#) ✓ **Edit**  
Assigned: 08Jan2021  
Completed: 08Jan2021 By John Smith
- [Enter date available for site visit](#)  
Assigned: -

### Complete feasibility survey

#### Task information

#### Task actions

[Edit survey response](#) 📄



## COMPLETE CDAs

If your sponsor or CRO assigns you a CDA task, it displays in your task list. In the Task materials section, click the document name to download the CDA for review and signature. If the CDA has been revised, you can view the full document history.

To upload your signed CDA or a version with suggested changes, click the Task actions button for this task. A window will open where you can attach your document and add comments for the sponsor or CRO.

You'll receive an email notification if they send comments or return the CDA with changes.

The screenshot displays a user interface for managing study workflow tasks. On the left, a summary shows: Completed (4), Pending (1), Current task (1), Discontinue (0), and Incomplete (0). Below this is a list of tasks, with the 'Sign and return CDA' task highlighted in orange. On the right, a modal window titled 'Sign and return CDA' is open, featuring a 'Comments:' text input field, a 'Drag and Drop' area with the instruction 'Select a file or drop one here.', and 'Done' and 'Cancel' buttons at the bottom.

**Note:** If your sponsor or CRO opted for digital signatures, you'll see additional details and information under the Task actions section on how to sign the document.

## MANAGE YOUR SITE PORTAL USER PROFILE

If you're logged in to the site portal, you can manage your user profile data like First and last names, Language, profile photo, and password. Click the menu icon (☰) at the upper right of your screen and choose **manage profile**.

You can update most profile fields except the Email address field, which is read-only and shows the address your CRO or Sponsor is using for you. If the information is incorrect, please contact them as soon as possible to make the necessary updates, as this address is critical for effective study communications.

### User profile

Please ensure your profile information is correct. It is very important to your study teams that your name and email address properly match!

First name: Gustavo

Last name: Gaxiola Meza

Title: Dr.

Language: English

Email address: ggm@example.org

Manage your password

Your current password expires on 26Aug2025 (90 days)

For security reasons it is recommended to update your password periodically. Password changes must be performed using the Update password button. The Save button at the top of the page will not update your password.


Current password

New password

Re-enter new password

Update password

Save Cancel



Your profile picture is used to represent you in Select and in communications to clinical sites.

Drag and Drop

Select a file or drop one here.

## BROWSERS

You can use the latest versions of Google Chrome, Microsoft Edge (Chromium), or Mozilla Firefox. Please note that Internet Explorer is not a supported browser.

## NEED HELP?

For assistance, reach out to your CRO or sponsor contact. You can also contact Oracle by phone 24/7 at 1.877.230.4168.