



3.1.7 Inviting Users

Invite new or existing users to access a study and assign appropriate roles and site access.

Invite a User to a Study

Before you begin, ensure you can access the Share screen for the study. For instructions, refer to [Using the Share Screen](#).

1. On the Share screen, locate the **People** section.
2. Click **Invite**.
3. Begin typing in the user field and choose one of the following options:
 1. **Invite a new user**
 - a. Select **Invite a new user**.
 - b. On the **Add User** screen, enter values for all required fields.
 - a. For information on "Admin" vs "User" user type, refer to [User Access & Sharing](#).
 - c. Click **Create User**.

□ **Note:** The username you enter cannot be changed after the user is created. Verify the username carefully before submitting.

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Add User

Username (note: this cannot be changed after the user is created) *

First Name *

Last Name *

Phone *

E-mail *

Organization *

User Type *

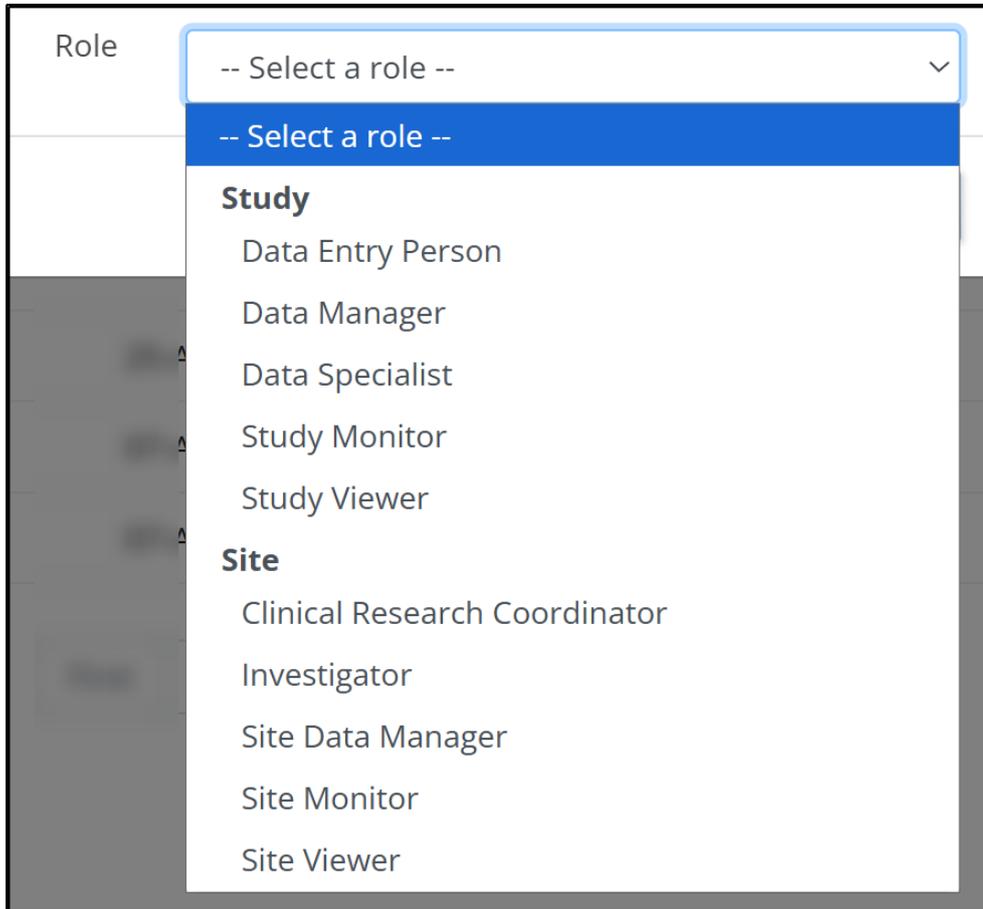
2. Add an existing user

- a. Select an existing user from the drop-down list.
- b. The system sends a new email invitation to the selected user.

□ **Note:** Each username and email address in the system must be unique.

4. When prompted, select a role from the list of available roles.

4. For more information about the permissions associated with each user role, refer to [User Access & Sharing](#).



□ **Tip:** To grant access to

multiple sites (for example, for a Monitor responsible for more than one site), click the **Site** field again and select additional sites as needed.

5. Click **Invite**.

An email invitation is sent to the user, and the user appears in the **People** table on the Share screen.

Password Requirements

Before a user can access a study, they must create a password that meets the following criteria:

- At least 8 characters in length
- Includes at least one of each of the following:
 - Lowercase letters (**a-z**)
 - Uppercase letters (**A-Z**)
 - Numbers (**0-9**)
 - Special characters (**!@#\$\$%^&***)

Once the password is created, the user can sign in and access the study according to the assigned role and site permissions.

Approved for publication by Kate Lambert. Signed on 2026-02-11 4:14PM

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