

# CTSA User Management

**V1.1: April 2, 2025:** Estimated 5 minute read

## Overview

This guide provides step-by-step instructions for hub administrators to manage new user requests within the CCOS Portal. It covers how to log in, access user requests, and approve or reject user requests. This guide also provides an overview of how to access the hub memberships for viewing hub user records, sorting columns, using search and filter options, and exporting user records.

**[Email CCOS Support](#)** with any questions.

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## Who can use this feature?

This feature is designed for the following roles:

**Hub Administrators:** A user role with specific permissions to manage and oversee activities within their respective CTSA hub. Hub Administrators are typically responsible for approving user account requests, managing hub memberships, and ensuring that their hub's information is accurate and up-to-date.

## Glossary

Quick definitions for terms used in this guide:

- **CCOS:** Coordination, Communication, and Operations Support Center
- **Support Ticket:** Each new user request creates a support ticket that the CCOS Support Team uses to track and manage the request. It is recommended you use the support ticket number in your communications with the CCOS Support Team so they can help you with any questions or issues identified with the new user request.
- **EC:** [Enterprise Committee](#)

## Version History

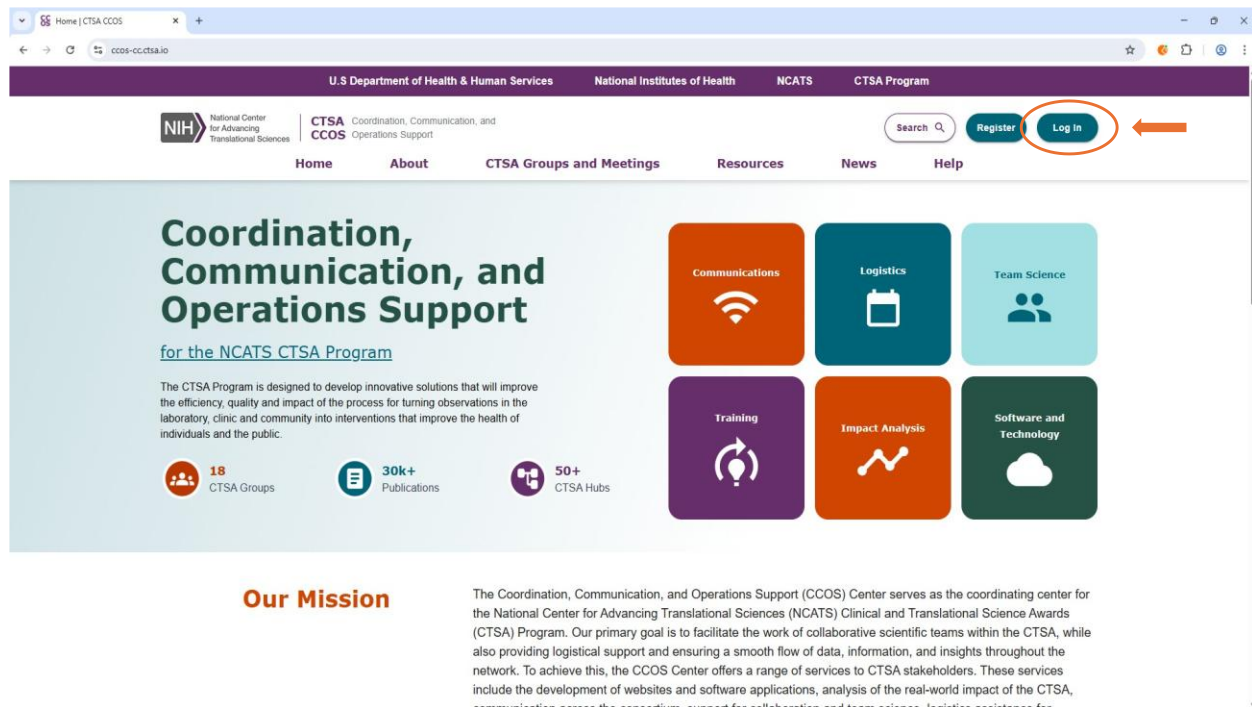
- **V1.1:** April 2, 2025
- **V1.0:** August 5, 2024

## Guidance

### Accessing User Management

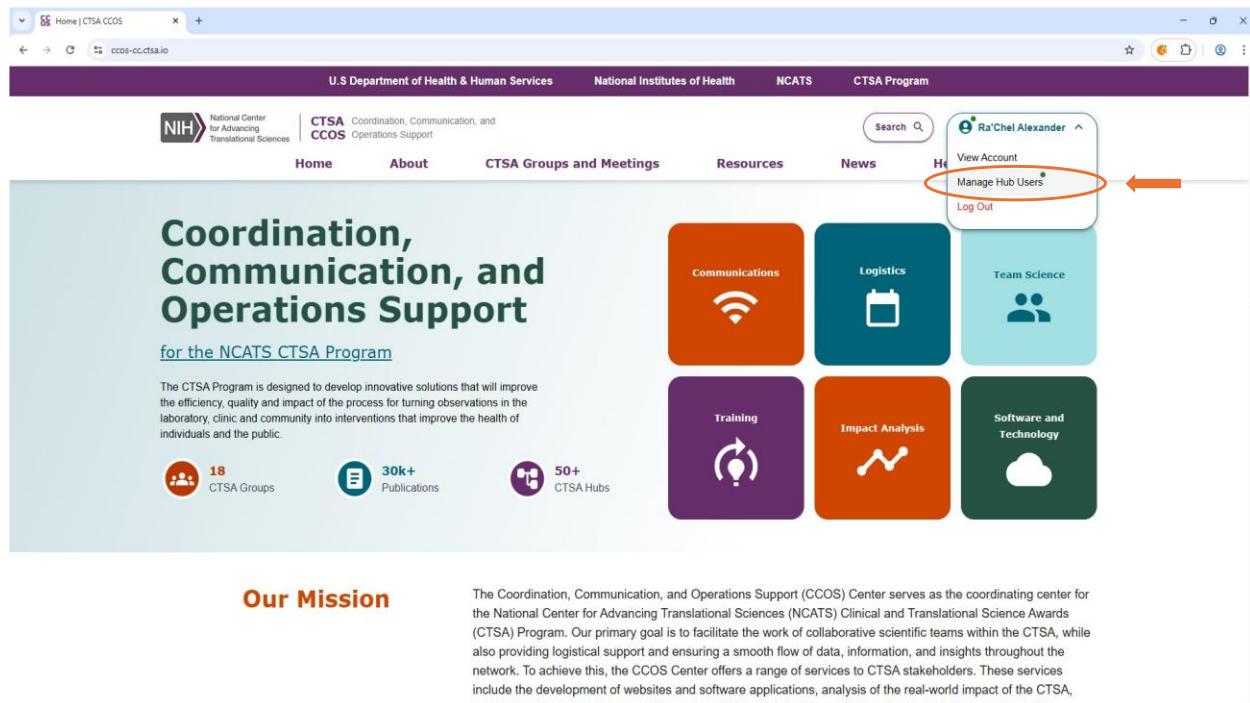
#### Step 1: Log in to the CCOS Portal

1. Open a web browser and navigate to the [CCOS Login Page](#).
2. Select 'Log In' in the top-right corner.
3. Complete the login process with your credentials.



## Step 2: Navigate to Manage Hub Users

1. Click on the Profile Icon at the top-right corner.
2. Select 'Manage Hub Users' from the dropdown menu.



## Accessing & Managing New User Requests

### Step 1: Access New User Requests

1. Click on 'New User Requests' on the left sidebar menu to navigate to the user request list for your hub.
2. If there are no new user requests, a message will display: *You have no new user account requests.*
3. If there are more than 10 pending requests:
  - a. Use the controls at the bottom of the table to navigate through pages.
  - b. Adjust the display settings to show more requests at once.

The screenshot shows the CCOS User Management interface. The top navigation bar includes the NIH logo, CTSA CCOS logo, and links to Home, About, CTSA Groups and Meetings, Resources, News, and Help. A search bar and a user profile dropdown for 'Ra'Chel Alexander' are also present. The main content area is titled 'User Management' and features a sidebar with 'Manage Hub Users' (containing 'New User Requests', 'Hub Membership', and 'EC Voter Assignments') and 'New User Requests'. The 'New User Requests' section displays a table of requests with columns for Name, Email, Institution, and Date Received. A red circle highlights the 'New User Requests' link in the sidebar, and an orange arrow points to the 'New User Requests' section header. The table contains one entry for 'Smith, John' with email 'john.smith@institution.edu' and date '4/1/2025'. The footer includes a note about CCOS funding by the National Center for Advancing Translational Sciences, National Institutes of Health.

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NIH National Center for Advancing Translational Sciences | CTSA CCOS Coordination, Communication, and Operations Support

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Need Help

Manage Hub Users

New User Requests

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New User Requests

CCOS

Verify new user account requests before accepting.  
For questions or corrections related to user accounts, please use the appropriate support ticket to contact the support team at [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io).

Name	Email	Institution	Date Received
Smith, John	john.smith@institution.edu	Digital Infuzion	4/1/2025

Rows per page: 10 1-2 of 2

Coordination, Communication, and Operations Support (CCOS) is funded by the [National Center for Advancing Translational Sciences, National Institutes of Health](#).

## Step 2: Review User Request Information

Each request includes the following details:

- **Name:** (Last Name, First Name)
- **Email**
- **Institution**
- **Date Received** (Sorted in ascending order by default)

The screenshot shows a web browser window with the URL `ccos-cc.ctsa.io/user-management/view=requests&pageSize=10`. The page header includes the U.S. Department of Health & Human Services, National Institutes of Health, NCATS, and CTSA Program logos. The main navigation bar contains links for Home, About, CTSA Groups and Meetings, Resources, News, and Help. A search bar and a user profile dropdown for 'Ra'Chel Alexander' are also present.

The page content is divided into two main sections: 'Manage Hub Users' and 'New User Requests'. Under 'Manage Hub Users', there are links for 'New User Requests', 'Hub Membership', and 'EC Voter Assignments'. An orange arrow points from 'EC Voter Assignments' to the 'New User Requests' section.

The 'New User Requests' section features a CCOS logo and a message: 'Verify new user account requests before accepting. For questions or corrections related to user accounts, please use the appropriate support ticket to contact the support team at [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io).' Below this is a table with the following data:

Name	Email	Institution	Date Received
Smith, John	john.smith@institution.edu	Digital Infuzion	4/1/2025

At the bottom of the table, it says 'Rows per page: 10' and '1-2 of 2'. A footer note states: 'Coordination, Communication, and Operations Support (CCOS) is funded by the [National Center for Advancing Translational Sciences, National Institutes of Health](#).'

## Step 3: Take Action on a Request

1. Locate the **'Action'** button to the right of each request.
2. Click the **'Action'** button to open a pop-up containing additional details:
  - a. **Support Ticket Number**
  - b. **Department**
  - c. **Primary CTSA Role**
  - d. **Hub**
  - e. **Approve / Reject Buttons**

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Search | Ra'Chel Alexander

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New User Requests

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Name	Email	Institution	Date Received	Action
Smith, John	john.smith@institution.edu	Digital Infuzion	4/1/2025	

Rows per page: 10 | 1-2 of 2

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Name	Email	Institution	Date Received	Action
Morelli, Jennifer	jennifer.morelli@institution.edu	Digital Infuzion	3/24/2025	
Smith, John	john.smith@institution.edu	Digital Infuzion	4/1/2025	

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**User Details - John Smith**

Name: John Smith  
Email: john.smith@institution.edu  
Institution: Digital Infuzion  
Department: N/A  
CTSA Role: Hub Member  
Hub: Not affiliated with any listed CTSA hubs  
Support Ticket: [CCOSHD-6033](#)

Action \*

Select

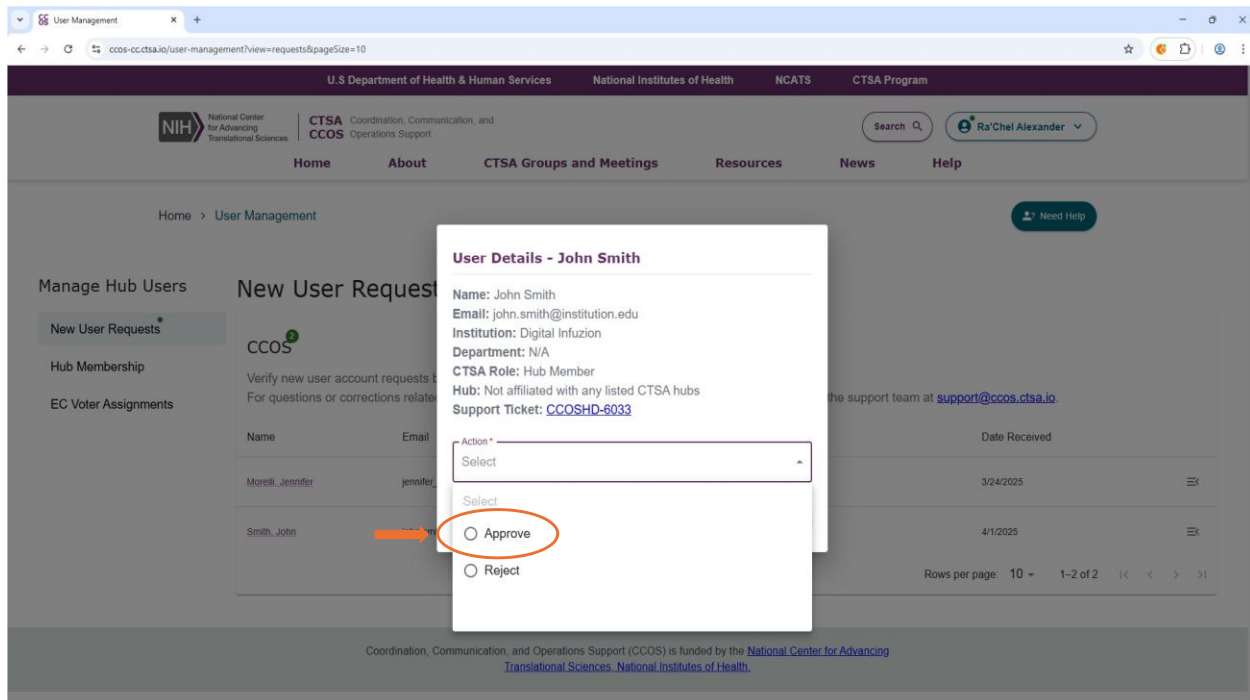
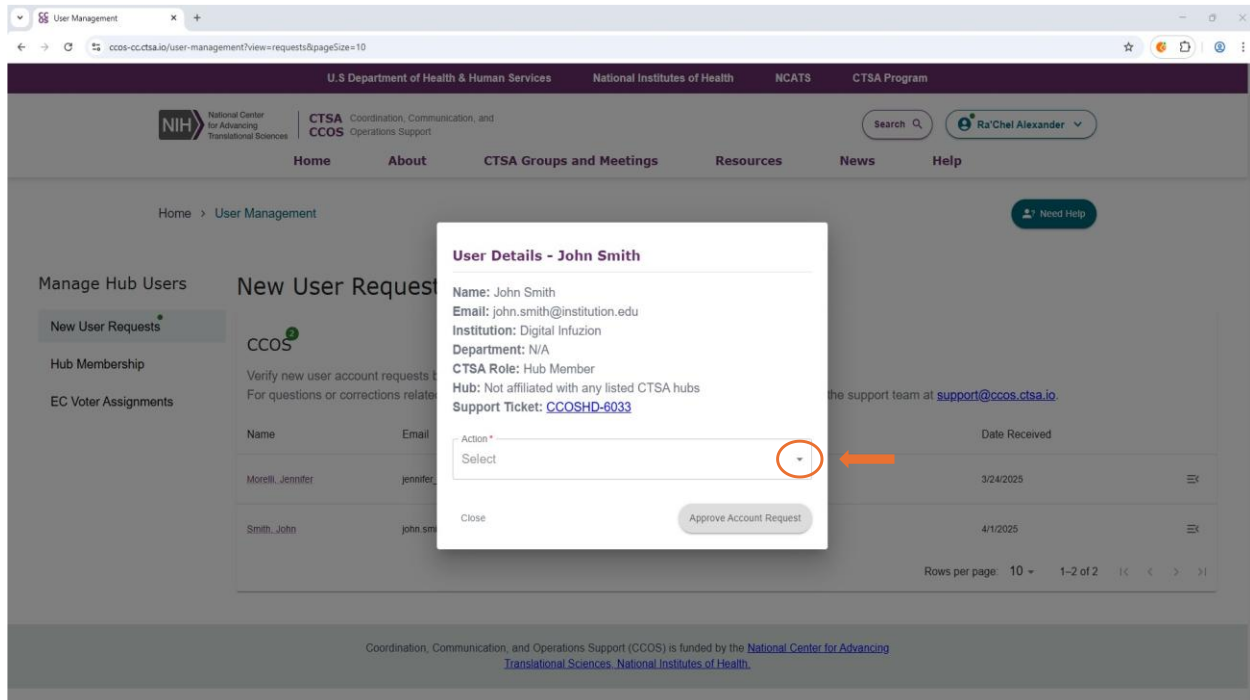
Close

Approve Account Request

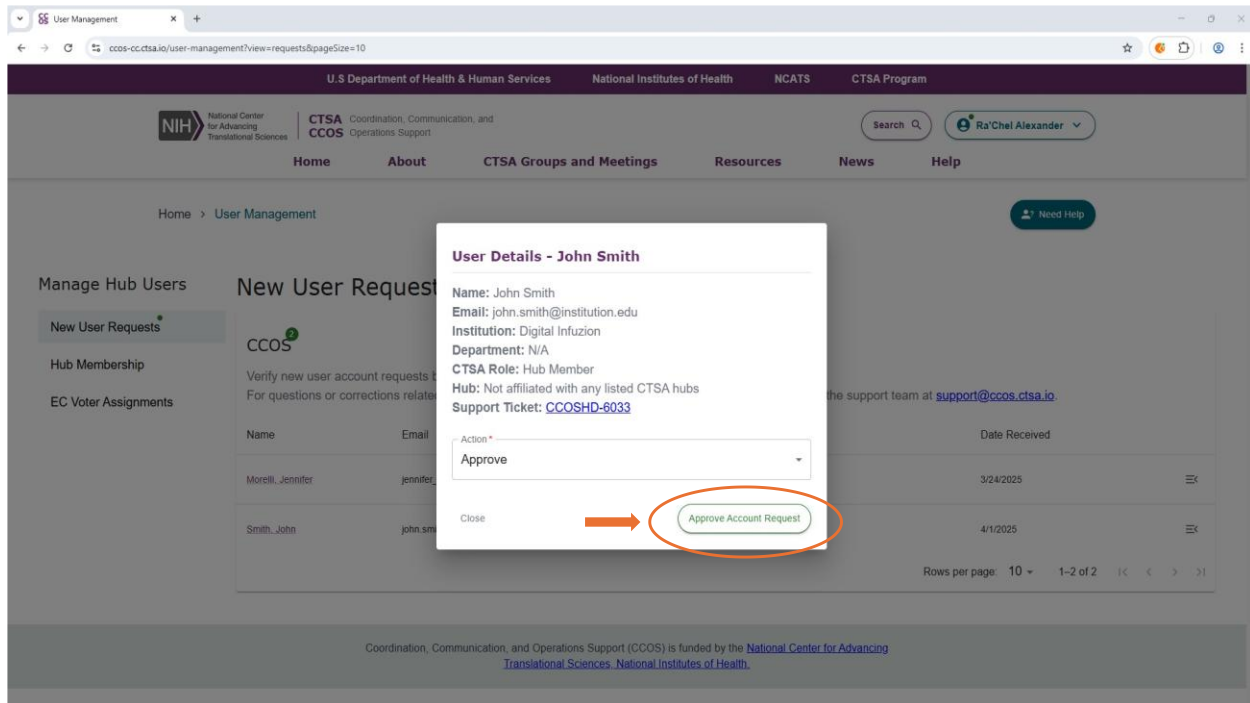
## Option 1: Approve New User Request

1. Click the selected user request 'Action' button.
2. Click the 'Approve' button in the pop-up.

3. You will see a temporary message in the table that states "Account Approved."
4. Once you refresh the page, the approved request will be removed from the table.







## Option 2: Reject New User Request

1. Click the selected user request 'Action' button.
2. Click the 'Reject' button for a selected user request in the pop-up.
3. A new text field will appear for you to enter why you would like to reject the user.
4. Enter the reason for rejection in the provided text field.
  - a. Please note this reason will be available to the person that made the new user account request.
5. You will see a temporary message in the table that states "Account Rejected."
6. Once you refresh the page, the rejected request will be removed from the table.

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CCOS

Verify new user account requests. For questions or corrections related to this page, please contact the support team at [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io).

Name Email

Morelli, Jennifer jennifer.morelli@nih.gov

Smith, John john.smith@institution.edu

**User Details - John Smith**

Name: John Smith  
Email: john.smith@institution.edu  
Institution: Digital Infuzion  
Department: N/A  
CTSA Role: Hub Member  
Hub: Not affiliated with any listed CTSA hubs  
Support Ticket: [CCOSHD-6033](#)

Action \*  
Select

Close Approve Account Request

Date Received

3/24/2025

4/1/2025

Rows per page: 10 1-2 of 2

Coordination, Communication, and Operations Support (CCOS) is funded by the [National Center for Advancing Translational Sciences, National Institutes of Health](#).

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Verify new user account requests. For questions or corrections related to this page, please contact the support team at [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io).

Name Email

Morelli, Jennifer jennifer.morelli@nih.gov

Smith, John john.smith@institution.edu

**User Details - John Smith**

Name: John Smith  
Email: john.smith@institution.edu  
Institution: Digital Infuzion  
Department: N/A  
CTSA Role: Hub Member  
Hub: Not affiliated with any listed CTSA hubs  
Support Ticket: [CCOSHD-6033](#)

Action \*  
Select

Select

☐ Approve

☐ Reject

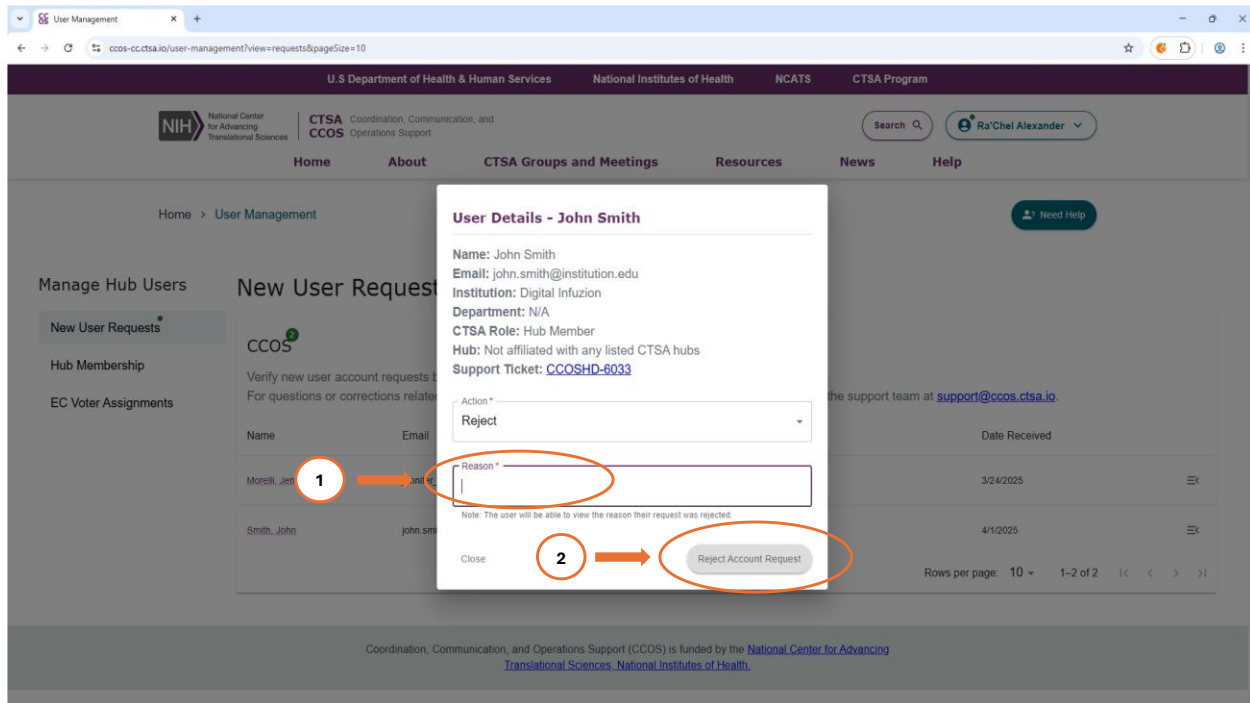
Date Received

3/24/2025

4/1/2025

Rows per page: 10 1-2 of 2

Coordination, Communication, and Operations Support (CCOS) is funded by the [National Center for Advancing Translational Sciences, National Institutes of Health](#).



## Accessing & Managing Hub Memberships

### Step 1: Access Hub Memberships

Click on 'Hub Membership' on the left sidebar menu to navigate to the Hub Membership for your hub.

If no users are registered, the message *"You have no users in your hub."* will appear.

The screenshot shows the CCOS User Management interface. The top navigation bar includes the NIH logo, CTSA CCOS logo, and links to Home, About, CTSA Groups and Meetings, Resources, News, and Help. A search bar and a user profile dropdown for Ra'Chel Alexander are also present. The main content area is titled 'Manage Hub Users' and 'Hub Membership'. On the left sidebar, 'Hub Membership' is highlighted with a red circle and an arrow. The main panel shows a search bar with 'Search By' and 'Search' fields, and an 'Institution' dropdown. Below the search bar, there is a table of users with columns for Status, Name, Email, Institution, Hub, and Primary CTSA Role. The table lists three users: ALI, MIRIAM (Approved), Aalsma, Matthew (Pre Approved), and Abebe, Ephrem (Pre Approved).

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CCOS

View existing CCOS users.

To remove a user or to make changes to a user account, contact [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io) with the corresponding support ticket number included.

Search By: Select Search

Institution: Select

EC Voting Status: Select

Apply

Count: 2776

Status	Name	Email	Institution	Hub	Primary CTSA Role
Approved	ALI, MIRIAM	miriana@digitalinfuzion.com	Digital Infuzion	Not affiliated with any listed CTSA hubs	CCOS
Pre Approved	Aalsma, Matthew	maalsma@iu.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other
Pre Approved	Abebe, Ephrem	eabebe@purdue.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other

## Step 2: Search and Filter Users

1. Use the **search bar** to find users by:
  - a. **Name**
  - b. **Email**
2. Apply **filters** to:
  - a. Identify users from specific **institutions**
  - b. Check users with **EC Voting status**

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Search [Ra'Chel Alexander]

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View existing CCOS users.

To remove a user or to make changes to a user account, contact [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io) with the corresponding support ticket number included.

Search By: Select Search

Search By selection needed

Institution: Select EC Voting Status: Select Apply

Count: 2776

Status	Name	Email	Institution	Hub	Primary CTSA Role
Approved	ALI, MIRIAM	miriana@digitalinfuzion.com	Digital Infuzion	Not affiliated with any listed CTSA hubs	CCOS
Pre Approved	Aalsma, Matthew	maalsma@iu.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other
Pre Approved	Abebe, Ephrem	eabebe@purdue.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other

## Step 3: Export User List

1. Click the **'Export All'** button in the top right corner above the table.
2. The user list will be downloaded as a **CSV file**.

The screenshot shows the 'User Management' page for the CCOS (Coordination, Communication, and Operations Support) system. The page is part of the NIH/CTSA program. The 'Hub Membership' section is active, displaying a list of users. An orange arrow points to the 'Export All' button in the top right corner of the user list area.

**Manage Hub Users**

- New User Requests
- Hub Membership**
- EC Voter Assignments

**Hub Membership**

CCOS

View existing CCOS users.  
To remove a user or to make changes to a user account, contact [support@ccos.ctsa.io](mailto:support@ccos.ctsa.io) with the corresponding support ticket number included.

Search By:  Search:  Institution:  EC Voting Status:

Count: 2776

Status	Name	Email	Institution	Hub	Primary CTSA Role
Approved	ALI, MIRIAM	miriana@digitalinfuzion.com	Digital Infuzion	Not affiliated with any listed CTSA hubs	CCOS
Pre Approved	Aalsma, Matthew	maalsma@iu.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other
Pre Approved	Abebe, Ephrem	eabebe@purdue.edu	Indiana University-Purdue University ...	Indiana Clinical and Translational Sci...	Other

## Step 4: Request User Account Changes

To remove a user or make changes to an account:

Contact [CCOS Support](mailto:support@ccos.ctsa.io) for assistance.