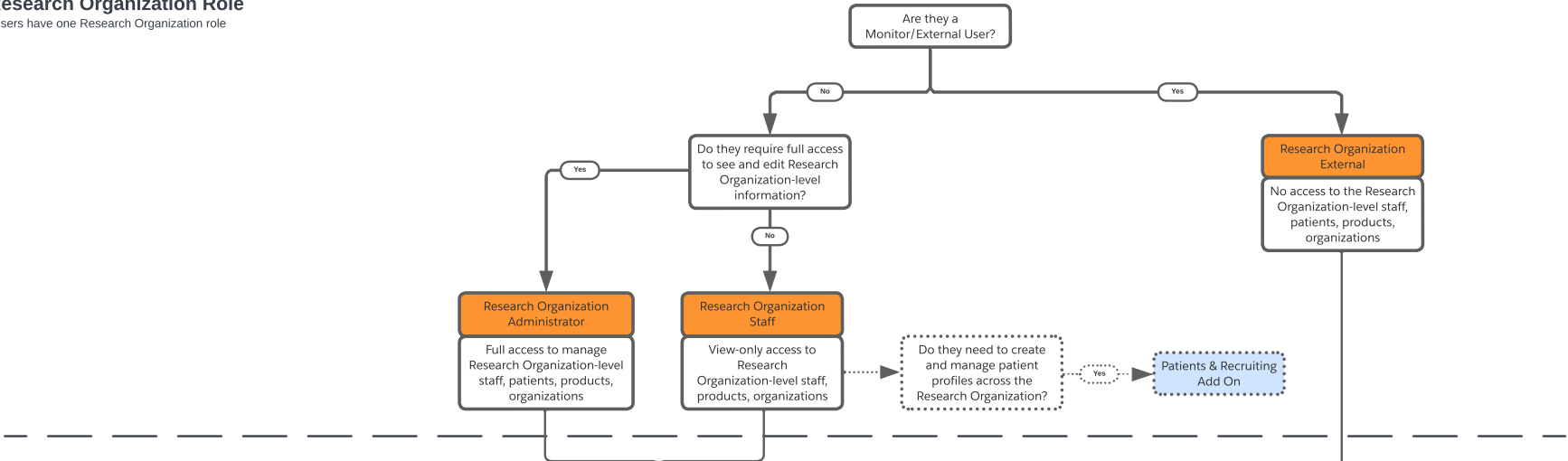# SiteVault Security Setup Flow Diagram

Research Organization Role
*Users have one Research Organization role

Are they a Monitor/External User?

- No →
- Yes →

No branch:

Do they require full access to see and edit Research Organization-level information?

- Yes →
- No →

Research Organization Administrator

Full access to manage Research Organization-level staff, patients, products, organizations

Research Organization Staff

View-only access to Research Organization-level staff, products, organizations

Do they need to create and manage patient profiles across the Research Organization?

- Yes →

Patients & Recruiting Add On

Yes branch:

Research Organization External

No access to the Research Organization-level staff, patients, products, organizations

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Research Site Role
*Users have a Research Site role at each Site that they require access to

Do they require full access to all site-level documents, workflows and participants for ALL studies at the Site as well as a need to create new site users and studies?

- Yes →
- No →

Research Site Administrator

Full access to manage Site and study-level staff, create studies, patients, products and organizations

Do they need to be able to upload documents and send them on workflows to other study team members?

- Yes →
- No →

Research Site Staff

When added to study team, full access to study documents, send documents on workflows, and create study participants

Research Site Viewer

View-only access to ALL STUDY level documents and study records for the assigned site. Can participate in relevant workflows.
*Do not need to be assigned to study as study team
*Cannot view Source documents (unless assigned to study) or Legal/Financial documents
*When assigned to a study, permissions match Site Staff

Research Site External

View-only access to finalized study and participant documents/data for study they are assigned to. Cannot view legal and financial documents.

Do they need to view all studies for an assigned site and fully manage all patient profiles and participant study records for the Site?

- Yes →

All Studies Patients & Recruiting Add On

Do they need to view all studies and manage all legal and financial documents for the Site?

- Yes →

All Studies Budgets & Contracts Add On

Do they need to create and manage Site-specific profile information or documents for staff, organizations, and products?

- Yes →

Site Profiles Add On