

NIHR Clinical Research Network

Getting started and logging into CPMS

Guidance Document

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Getting started and logging into CPMS

This CPMS user guide will cover the following topics:

- What is Central Portfolio Management System (CPMS)?
- Types of Studies on CPMS
 - Non-commercial studies
 - Commercial contract studies
- Who uses CPMS and for what activities?
- How to log into CPMS
- Finding your study

What is Central Portfolio Management System (CPMS)?

CPMS is an online database used for the management of all study records within the National Institute for Health Research (NIHR) Clinical Research Network (CRN) Portfolio.

CPMS is used to collect and manage study information from set-up to completion and also supports the platform for the life-sciences industry to access our free-of-charge feasibility services. Study data stored in CPMS is used to support performance management of studies so that Portfolio studies achieve recruitment and time targets.

Types of studies on CPMS

Studies included on the Portfolio and managed in CPMS must meet the eligibility criteria outlined by the [Department of Health and Social Care](#). Further details around the NIHR CRN's eligibility criteria can be found on the [eligibility for NIHR support page](#).

Studies eligible for NIHR support and managed in CPMS are broadly categorised as being either one of the following types:

1. Non-commercial studies funded by automatically eligible funding streams

These include studies with some or all of their research funding provided by:

- The NIHR
- Other areas of central Government
- NIHR non-commercial Partners

NIHR non-commercial Partners are organisations that:

- Award research funds as a result of open competition across England with high quality peer review
- Fund research that is of clear value to the NHS, social care or public health
- Take appropriate account of the priorities, needs and realities of the NHS, social care or public health in making decisions about the research that they fund

2. Non-commercial studies funded by potentially eligible funding streams

These include studies with research funding provided by:

- Industry: Investigator-initiated, commercial-collaborative research (Industry-funded, non-industry sponsored) studies
- Overseas governments
- Overseas charities

3. Commercial contract research:

These studies will be commercially funded, commercially sponsored studies, supported by the life-sciences industry which meet the definition of research and have appropriate ethical approval; and Health Research Authority approval where required, prior to initiation at individual sites.

Who uses CPMS and for what activities?

National Portfolio Manager

- These users are based at the Clinical Research Network Coordinating Centre.
- This role allows overall management of study records with complete editing and approval rights for all study record data.

Local Portfolio Manager

- These users are based at Local Clinical Research Networks (LCRNs).
- Local Portfolio Manager access allows some edit rights of study records to support the provision of study information and general troubleshooting. Changes to study records requested by these users must be approved by a National Portfolio Manager.
- For Commercial studies, Local Portfolio Managers are able to provide site specific responses to commercial feasibility requests in CPMS.

Non-commercial study teams

- These users can access the study records associated with their studies and have the ability to upload research activity data.
- Users can request changes to be made to their study records, but these must be approved by a National Portfolio Manager.
- Non-commercial study teams can also apply for ISRCTN registration via CPMS.

Company representatives (Commercial studies)

- Company representatives are able to access our free-of-charge feasibility services through the online submission platform in CPMS.
- Company representatives can also view the study records for the studies they have submitted to us.

How to log into CPMS

Existing NIHR email address holders

Any users of CPMS who already have an NIHR email address can easily login through the Identity Gateway at cpms.nihr.ac.uk. Simply click on the link “Login with your NIHR Hub Account” to enter CPMS.

Identity Gateway

Login with your NIHR Hub account ⓘ

If you have an @nihr.ac.uk email address, you no longer need separate usernames and passwords for each system. Just click on the blue button below.



OR

Login with your email address

Username

Password

Remember me on this computer

LOGIN

[Forgot your password?](#)
[Create account?](#)

Non-NIHR email address holders

Any new user without an existing account can create an account within CPMS by clicking on the “Create account” link

Identity Gateway

Login with your NIHR Hub account

If you have an @nihr.ac.uk email address, you no longer need separate usernames and passwords for each system. Just click on the blue button below.

 LOGIN WITH YOUR NIHR ACCOUNT

OR

Login with your email address

Username

Password

Remember me on this computer

LOGIN

[Forgot your password?](#)

[Create account?](#)


You will then be directed to the “Create account” page. Complete the details on the form and agree to the ‘Terms and Conditions’ before clicking the **Next** button

Create account

[< Back to the login page](#)

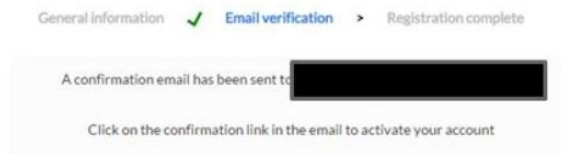
Please complete the form below to sign up to the Central Portfolio Management System (CPMS). If you have an NIHR account, you can login by clicking on the “Login with your NIHR account” button.

General information > Email verification > Registration complete

First name *	<input type="text"/>
Last name *	<input type="text"/>
Email *	<input type="text"/>
Confirm email *	<input type="text"/>
Password *	<input type="password"/>
Confirm password *	<input type="password"/>
ORCID 	<input type="text"/>
CPMS required information	
I have read and agree to the Terms and Conditions *	
<input type="checkbox"/>	
Next	

You will be directed to a page asking you to validate your new CPMS account via a confirmation link sent to you via email.

Create account




When your new account has been created and you have confirmed the link in your email, you can login to the Identity Gateway at cpms.nihr.ac.uk by using the “Non-NIHR Login” area to enter your email and password

Identity Gateway

Login with your NIHR Hub account ⓘ

If you have an @nihr.ac.uk email address, you no longer need separate usernames and passwords for each system. Just click on the blue button below.

 LOGIN WITH YOUR NIHR ACCOUNT

OR

Login with your email address

Username

Password

Remember me on this computer

LOGIN

[Forgot your password?](#)
[Create account?](#)

Finding your study

The CPMS home screen is shown in the image below:

- The toolbar is on the left.
- Your user name is displayed in the top right.
- The information in the orange boxes shows:
 - The current number of studies open in CPMS
 - The number of studies with activity uploaded in the last month
 - The number of participants recruited in this Financial year

1. Once logged into CPMS, hover over the toolbar on the left and it will expand.
2. Click on 'studies' and it will show you all the studies that are linked to your user name.

The screenshot displays the Central Portfolio Management System (CPMS) dashboard. At the top, the header includes a back arrow, the system name 'CENTRAL PORTFOLIO MANAGEMENT SYSTEM', the user email 'AMY.REBANE@NIHR.AC.UK', and the NHS logo. A left-hand navigation menu lists: Home, Studies, PAF Submissions, IRAS Submissions, Research Activity, CRN Study Submissions, Studies Requiring Action, and User List. The main content area features three orange summary cards: '4783 STUDIES OPEN IN CPMS', '429 STUDIES WITH ACTIVITY UPLOADED IN THIS CALENDAR MONTH', and '293578 NUMBER OF UK PARTICIPANTS REPORTED IN THIS FINANCIAL YEAR'. Below these is a 'CPMS' section with a welcome message and a list of user capabilities: managing study records, submitting research activity, and submitting service requests. Support information is provided at the bottom of the section.

Home

Studies

PAF Submissions

IRAS Submissions

Research Activity

CRN Study Submissions

Studies Requiring Action

User List

4783
STUDIES OPEN IN CPMS

429
STUDIES WITH ACTIVITY UPLOADED IN THIS CALENDAR MONTH

293578
NUMBER OF UK PARTICIPANTS REPORTED IN THIS FINANCIAL YEAR

CPMS

Welcome to NIHR Clinical Research Network's (CRN) Central Portfolio Management System (CPMS). This system allows users to:

- Manage study records from set-up to completion. See the Studies section in the left-hand navigation. This will be available if you have a role on a study.
- Submit research activity for current studies. See the Research Activity section. This will be available if you have a role on a study.
- Life-sciences industry users can submit service requests to request CRN support. See the Study Submissions section.

You can find support at [CRN Learn](#) or our [website](#). If you have any further questions or if you require support, please contact - SupportMyStudy@nihr.ac.uk

When you no longer require a CPMS account

If you leave your position or for other reasons no longer require a CPMS account, please ensure you submit a request to deactivate your CPMS account by emailing: crn.servicedesk@nihr.ac.uk