



## CITI Program Admins Access

- Search & add members
- Update member accounts: email, password reset, remove affiliation
- Add & remove courses for members, view course completion history for members
- Review course catalog and admin list

## Campus Affiliations

- Admins cannot add an affiliation to an existing member. The member will need to do this.

## CITI Program Admins Can Request:

(by emailing [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org))

- Merge duplicate member accounts
- Updates to your course catalog
- Update to admins
- Training for CITI Program admins

# Members

**Adding members:** individuals can create their own accounts and affiliate themselves to your institution, or you can create accounts for them by going to: Admin>Members>Add a Member to My Institution.

If you set up an account for a member, they will get an email from CITI Program once you complete the form with info on how to access CITI Program. You will also get an email letting you know the account has been created.



The screenshot displays the CITI PROGRAM website interface. At the top, the navigation menu includes 'My Courses', 'My Records', 'My CE/CMEs', 'Support', and 'Admin' (highlighted with a red box and a '1' callout). Below this, a secondary navigation bar shows 'Admin' (highlighted), 'Institutions', and 'Members'. The breadcrumb trail reads 'Institutions > Empire State College > Institution Management'. A horizontal menu contains 'Profile', 'Enrollment Questions', 'Members' (highlighted with a red box and a '2' callout), and 'Reports'. A dropdown menu is open under 'Members', listing options: 'Member Search', 'Members Enrolled in a Group', 'Members Not Enrolled In Any Group', 'Institutional Administrators', 'View Member Name Changes', and 'Add a Member to My Institution' (highlighted with a red box and a '3' callout, with a mouse cursor pointing to it). Below the navigation, the 'Institution Management' section features three main categories: 'Series Selection Forms', 'Series Selection Forms', and 'Merge Duplicate Accounts'. The bottom section of the page shows the login area with the CITI PROGRAM logo, 'LOG IN', 'LOG IN THROUGH MY ORGANIZATION', and 'REGISTER' (highlighted with a red box). Below these are input fields for 'Username' (with a 'Forgot?' link) and 'Password' (with a 'Forgot?' link), and a 'Log In' button.

# Members

Member Search: you can search for members by going to Admin>Members>Member Search.

You can search by name, email, etc.



[My Courses](#)

[My Records](#)

[My CE/CMEs](#)

[Support](#)

[Admin](#)

1

Admin

Institutions

Members

Institutions > Empire State College > Institution Management

Profile

Enrollment Questions

2

Members

Reports

Institution Management

3

Member Search

Members Enrolled in a Group

Members Not Enrolled In Any Group

Institutional Administrators

Series Selection Forms

Series Selection Forms

Members (2435)

[View All Members](#)

[Register a New Member](#)

Search by MemberID

Search by CR #

Search by Username

Search by Last Name

And

First Name (optional)

Search by Email Address

(primary or secondary)

# Members

**Member Information:** from a member's profile, you can update their email addresses or send a password reset email.

You can also view when the account was created and when they last logged in.

Note: we highly recommend institutional emails be used for the username as this will help with the future SSO project. Once a username is established by the user, we cannot change it.



## Member Information for Michael Tester (3325175)

Member:	Michael Tester (3325175)	<a href="#">Update Name and Email Addresses</a>
Last Login:	05-Feb-2013 05:17:10 PM ET	
Account Created:	28-Jan-2013 06:18:20 PM ET	
Username:	mt28410	
Email:	mt28410@aol.com	<a href="#">Send Password Reset Email</a>
Secondary Email:		
Modules Completed:	<a href="#">View</a>	
Exams Completed:	<a href="#">View</a>	
Name Changes	No records found.	

## Update name and Email Addresses - Michael Tester (ID:3325175)

Member	Michael Tester (3325175)
First Name*	<input type="text" value="Michael"/>
Last Name*	<input type="text" value="Tester"/>
Primary Email*	<input type="text" value="mt28410@aol.com"/>
Secondary Email	<input type="text"/>

[Cancel](#)

[Update](#)

# Members

**Member Information:** from a member's profile, you can update their email addresses or send a password reset email.

Users can use the password reset functionality from the login screen or you can send them a password reset email from their account.



## Member Information for Michael Tester (3325175)

Member:	Michael Tester (3325175)	<a href="#">Update Name and Email Addresses</a>
Last Login:	05-Feb-2013 05:17:10 PM ET	
Account Created:	28-Jan-2013 06:18:20 PM ET	
Username:	mt28410	
Email:	mt28410@aol.com	<a href="#">Send Password Reset Email</a>
Secondary Email:		
Modules Completed:	<a href="#">View</a>	
Exams Completed:	<a href="#">View</a>	
Name Changes	No records found.	

## Send Password Reset Email - Michael Tester (ID:3325175)

**!** Please confirm that you wish to resend the password reset email to the member shown below.

Member:	Michael Tester (3325175)
Primary Email:	mt28410@aol.com

# Members

**Affiliations:** from the member's profile, you will be able to see SUNY institutions they are affiliated with and the courses under each institution.

You can add and remove courses for the member and if the member is no longer associated with your institution, we recommend that you remove their affiliation. They retain their course completion but cannot sign up for additional courses.



**Affiliated Institutions:**

← SUNY Upstate Medical University (ID: 283) Member Info Add Courses Remove Courses Remove Affiliation

[View Institution](#) Course Completion History

**Curricula Information**

Course	Stage	CR#	Status	View
Group 1.Biomedical Investigators and Key Personnel - Including Drug & Device Research	Refresher Course	43403656	Passed 09/21/2021	<a href="#">Modules Completed</a>
Responsible Conduct of Research	Stage 1	38567409	Passed 03/10/2021	<a href="#">Modules Completed</a>
Conflict of Interest	Stage 2	19913236	Passed 09/21/2021	<a href="#">Modules Completed</a>

Note: All Dates and Times in U.S. Eastern Time.

[Institution Management](#) > [Member Information](#) > [Remove Affiliation](#)

[Profile](#) [Enrollment Questions](#) [Members](#) [Reports](#)

**Remove Affiliation for Empire State College- Michael Tester (ID:3325175)**

**You have chosen to remove the affiliation with Empire State College for Michael Tester (3325175). They will be unenrolled from all groups at Empire State College. Completion Reports that they have earned from Empire State College will not be deleted.**

[Cancel](#) [Remove](#)

# Members

**Member list:** You can view and export a list of all your members by going to Admin>Members>Member Search>View All Members>Download Excel Spreadsheet.

The screenshot shows the CITI PROGRAM website's Admin interface. The top navigation bar includes links for My Courses, My Records, My CE/CMEs, Support, and Admin (highlighted with a red box and a '1' notification). Below this, a secondary navigation bar has tabs for Admin, Institutions, and Members. The breadcrumb trail reads 'Institution Management > Members > Member Search'. A main menu contains buttons for Profile, Enrollment Questions, Members (highlighted with a red box and a '2' notification), and Reports. A dropdown menu is open under Members, with 'Member Search' highlighted (red box and '3' notification). Other options in the dropdown include 'Members Enrolled in a Group', 'Members Not Enrolled In Any Group', 'Institutional Administrators', and 'View Member Name Changes'. To the right, a 'View All Members' button is highlighted with a red box and a '4' notification. Below the menu, there are search fields for 'Search by MemberID' and 'Search by CR #'. A 'Go' button is visible on the right side of the search area.

The screenshot shows the results of a member search. The table displays the following data:

67015	NYoung1231	09-12-2004
74170	aprilbatt	10-04-2004
74446	kmil1205	10-05-2004
77032	dbarbato1	10-13-2004

Below the table, there is a 'Download Excel Spreadsheet' button (highlighted with a red box and a '5' notification) and a 'Back' button. The page indicates 'Displaying 1 - 10 of 5342' members. Navigation controls for the list are visible at the bottom right, showing page 1 of 3.

# Courses

**Active Courses:** to see your list of active courses, go to:  
Admin>Reports>Report Menu> Active Courses Being Used

We recommend you review your list of courses and modules within the courses every 3 years.

Send any course updates to [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).



The screenshot shows the CITI PROGRAM website interface. At the top, there is a navigation bar with links for "My Courses", "My Records", "My CE/CMEs", "Support", and "Admin" (highlighted with a red box and a "1" in a red circle). Below this is a secondary navigation bar with "Admin" (highlighted), "Institutions", and "Members". The main content area is titled "Institution Management > Reports". There are three main menu items: "Profile", "Enrollment Questions", and "Members". A "Reports" menu item is highlighted with a red box and a "2" in a red circle, and its dropdown menu is open, showing "Report Menu" (highlighted with a red box and a "3" in a red circle) and "Information Included In Reports". Under the "Reports" section, there are two main categories: "Completion Reports" and "Course Reports". Under "Completion Reports", there are three links: "Completion Report Data by Time and Group", "Completion Reports That Will Soon Expire", and "Completion Reports That Are Now Overdue". Under "Course Reports", there are two links: "Active Courses Being Used" (highlighted with a red box and a "4" in a red circle) and "Inactive Courses with Completion Reports".

# Courses

**Active Courses:** to see your list of active courses, go to:

Admin>Reports>Report Menu> Active Courses Being Used

This is what the report looks like. You can see the number of times the course has been taken and drill down even further to see modules in each course and how many people have taken the course.



## Active Courses Being Used

[Institution Management](#) > [Reports](#) > Active Courses Being Used

### Active Courses Being Used

- Click the stage to view the modules as they appear in the gradebook
- Click the number of completion reports earned to view a list of completion reports

GROUPS	STAGE	# OF CRS EARNED
<b>Antibody Production in Animals (ID: 70133)</b>	<a href="#">1 - Lab Animal Research (ID: 138416)</a>	<a href="#">2</a>
<b>Biomedical Investigators (ID: 4788)</b>	<a href="#">1 - Basic Course (ID: 45061)</a> <a href="#">2 - Refresher Course (ID: 86269)</a>	<a href="#">27</a> <a href="#">5</a>
<b>Biomedical Responsible Conduct of Research Course (ID: 26427)</b>	<a href="#">1 - Basic Course (ID: 86232)</a> <a href="#">2 - Refresher Course (ID: 167047)</a>	<a href="#">170</a> <a href="#">15</a>

# Courses

All course changes must come through RF Central Office so that we can verify that they are in line with the RF Wide Agreement with CITI Program.

To add a new course that is part of our agreement:

1. Go to Admin>Series Selection Form and search for the course you would like to add.
2. Complete the form and email it to [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).



A screenshot of the CITI Program web application interface. At the top left is the CITI PROGRAM logo. To its right are navigation links: "My Courses", "My Records", "My CE/CMEs", "Support", and "Admin" (which is highlighted with a red box and a small red "1" above it). Below these is a dark blue horizontal bar with "Admin" (highlighted in orange), "Institutions", and "Members". Underneath is a breadcrumb trail: "Institutions &gt; Empire State College &gt; Institution Management". A row of four buttons follows: "Profile" (with a building icon), "Enrollment Questions" (with a clipboard icon), "Members" (with a person icon), and "Reports" (with a document icon). Below this is the heading "Institution Management". A grey bar contains the text "Series Selection Forms". Underneath, a button labeled "Series Selection Forms" is highlighted with a red box and a small red "2" to its left.

If you are interested in a course that is not part of our agreement, please email [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).

# Admins

To see your current list of admins and the modules they can access:

Admin>Members>Institutional Administrators.

Reminder: remove admins (and remove their affiliation with your campus) as they leave your organization or change roles. We recommend you review your list of admins annually.

Send all admin updates to [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).



A screenshot of the Citi Program web application interface. At the top, the Citi Program logo is on the left, and navigation links for "My Courses", "My Records", "My CE/CMEs", "Support", and "Admin" are on the right. The "Admin" link is highlighted with a red box and a small red "1" above it. Below the navigation bar, a blue header contains "Admin", "Institutions", and "Members". The breadcrumb trail reads "Institutions &gt; Empire State College &gt; Institution Management". A row of four buttons is shown: "Profile", "Enrollment Questions", "Members", and "Reports". The "Members" button is highlighted with a red box and a small red "2" above it. A dropdown menu is open from the "Members" button, listing several options: "Member Search", "Members Enrolled in a Group", "Members Not Enrolled In Any Group", "Institutional Administrators", "View Member Name Changes", and "Add a Member to My Institution". The "Institutional Administrators" option is highlighted with a red box and a small red "3" to its left, with a mouse cursor pointing at it. Below the dropdown, there are three main sections: "Series Selection Forms" (with a sub-link "Series Selection Forms"), and "Merge Duplicate Accounts".

CITI Program Admins are also added to the [citiprogramadministrators@rfsuny.org](mailto:citiprogramadministrators@rfsuny.org) distribution list. If you believe you are not on the list, please email [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).

## Merge

**Merging accounts:** to merge duplicate accounts, send an email to [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org) with the following information:

1. Name and ID of the account you want to keep
2. Name and ID of the account(s) you want to merge

! CITI Program data is synced with PACS nightly. Cleaning up duplicate accounts will help with issues with the sync.



## Support

For any questions related to CITI Program or requests for training, please send an email to [CustomerServices@rfsuny.org](mailto:CustomerServices@rfsuny.org).

## Thank you!

CITI Program Support Team:  
Anna Hartz, Linh Hoang