

Research - Adding Roles to a Protocol



Digital Health
CONNECTING BEST CARE

Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

Add a role to a protocol. Roles are particular users that will be able to access, edit, modify and delete certain elements within a trial. Examples of this include:

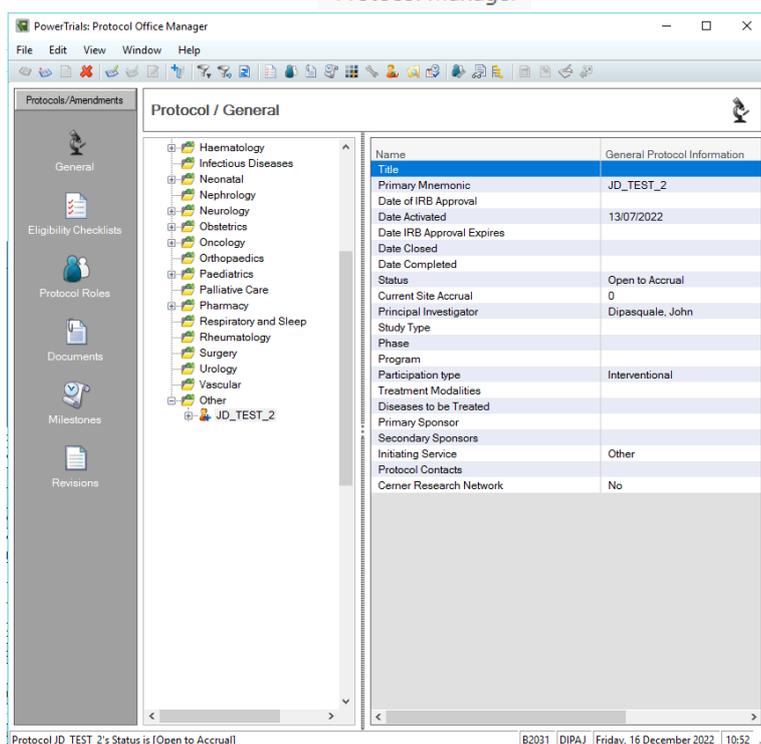
- Add/remove/modifying patients from a Protocol
- Add/remove/modifying documents from a Protocol
- Add/remove/modifying consent details
- Add/remove/modifying roles

Pre-Requisites: In order to add/remove/modifying users/roles you must already have access to the Protocol

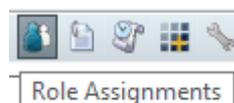
1. Launch **Protocol Office Manager (POM)**



2. Navigate and select the trial that you wish you add/remove/modify user roles



3. Select the **Role Assignment** button in the toolbar



The role assignment window will then appear

Contact	Role	Person Name	Position	Organization	Type
<input type="checkbox"/>	Creator	Dipasquale, John			Personal
<input type="checkbox"/>	Principal Investigator	Dipasquale, John			Personal
	Coordinating Institution			WHS Sunshine Hospital	Organisational

4. Add the:
 - Role name
 - Role type
 - Person Name
5. Press **Add**

This will place the person into the list of users that already have access to the trial window.

6. Tick the user as a contact if applicable

Contact	Role	Person Name	Position	Organization	Type
<input type="checkbox"/>	Creator	Dipasquale, John			Personal
<input type="checkbox"/>	Principal Investigator	Dipasquale, John			Personal
	Coordinating Institution			WHS Sunshine Hospital	Organisational

Important – Contact Flag

By marking a user as a contact this will allow:

- Message centre notification when a patient enrolled on the trial is admitted into the hospital
- Message centre if a patient enrolled on the trial has been marked as deceased
- Allows the contact to be seen within PowerChart against the protocol should someone require more information about the protocol

7. Select **OK/Apply**

This will now grant the user access to the protocol. Ensure that a 'Coordinating Institution' (Location), Principal Investigator and Study Coordinator are added to the protocol at a minimum.