

Research - Protocol Document Management



Digital Health
CONNECTING BEST CARE

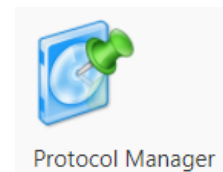
Digital Health
Quick Reference Guide

This Quick Reference Guide will explain how to:

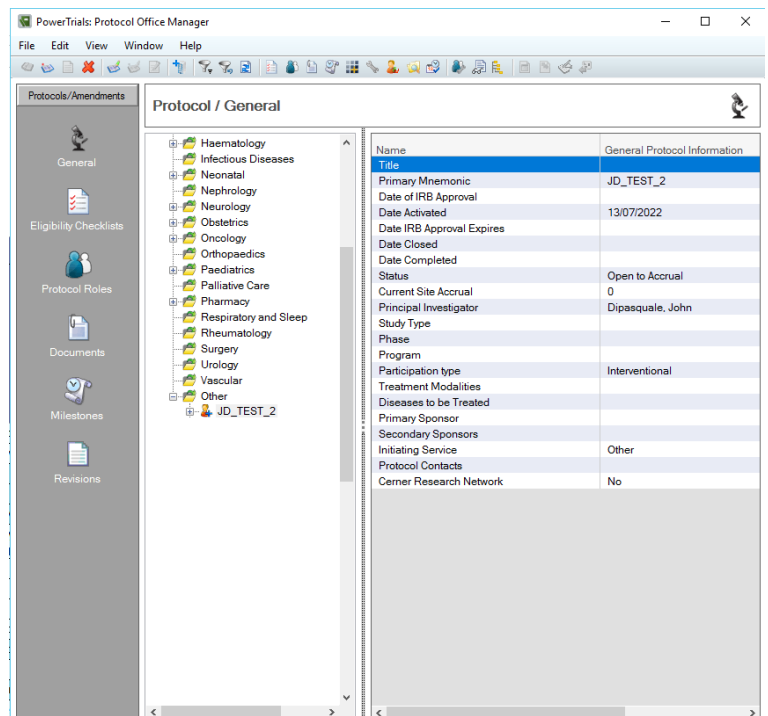
How to management documents against a research protocol to allow for a quick and easy access to files through PowerChart and Protocol Office Manager (POM)

Pre-Requisites: In order to add/remove/modify documents, 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 documents

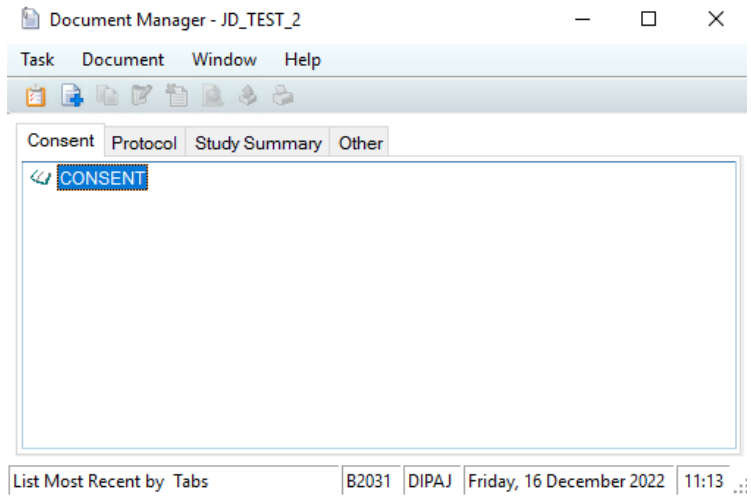


3. Select the **Document Manager** button in the toolbar



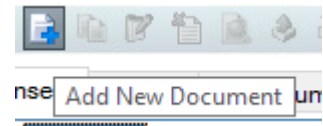
The document manager will then appear. Here you can add documents relating to:

- Consent
- Protocol
- Study Summary and;
- Other



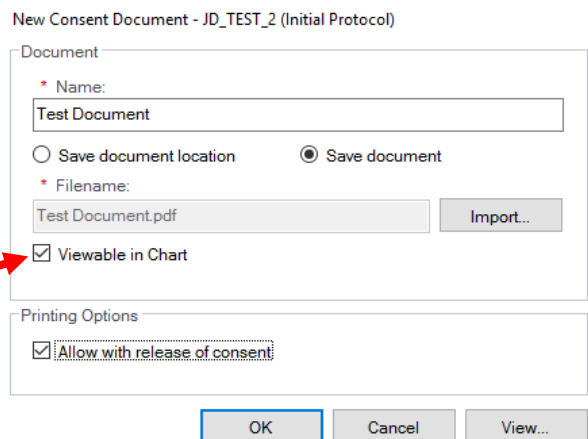
Adding Documents

1. Select the appropriate tab within document manager and select the Add New Document button



The new document window will appear

2. Populate the relevant fields (i.e Name The document) and select OK

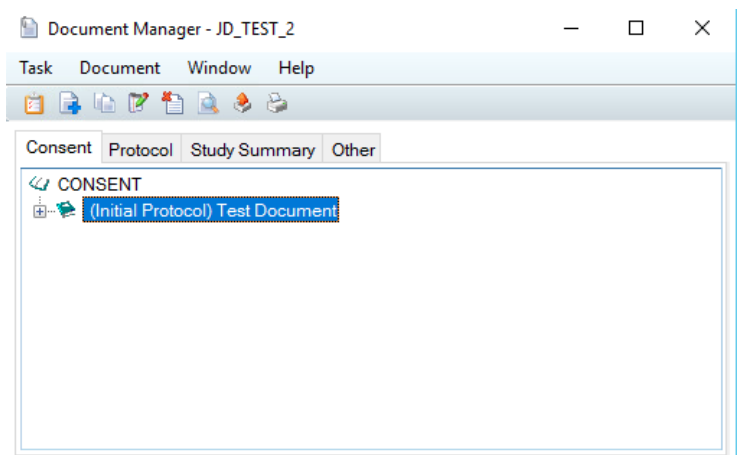


Handy Hint – Viewable in Chart

Refers to the document being accessible via PowerChart



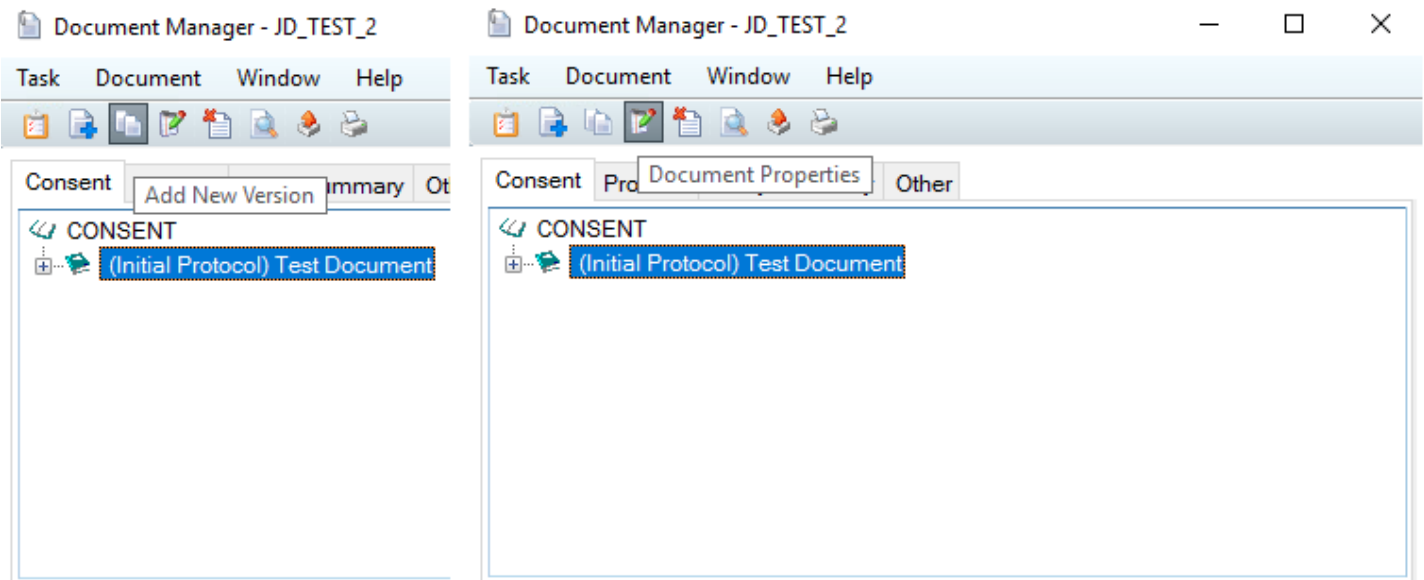
The document will then be visible in the document manager





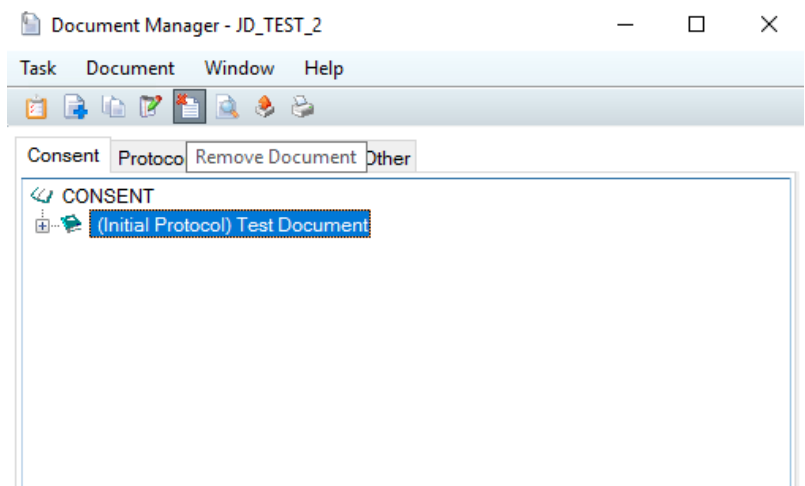
Modifying Documents

1. Locate the document you wish to edit from document manager
2. Use the:
 - a. Add New Version button; to upload a new version of the existing document
 - b. Use the Document Properties button; to change elements of the document such as visibility from PowerChart



Deleting Documents

1. Locate the document you wish to delete from document manager
2. Select the Remove Document button



3. Select **Yes** on the confirmation window

