## Research -Creating a Protocol in Protocol Office Manager (POM)



Digital Health Quick Reference Guide

## This Quick Reference Guide will explain how to:

Create a protocol in Protocol Office Manager (POM) via pomanager.exe

## Important – To open protocol for patient enrolment on EMR

To enrol patients, or screen patients using the pre-screening rule\* functionality, the following tasks must be completed, at a minimum:

Task	Details	Reference QRG
Protocol Creation	Create the study protocol	This QRG
Role Assignment to	Minimum entry to allow enrolment and screening:	Research –
the Protocol	Principal Investigator	Adding Roles to a Protocol
	Study Coordinator	
	Coordinating Institute (Main WH location)	
Milestone Dates to	Minimum entry to allow enrolment and screening:	Research –
the Protocol	<ul> <li>'Activated by' date populated</li> </ul>	Managing Milestones in Protocol
	<ul> <li>'Next Status' set to 'Open for Accrual'</li> </ul>	Office Manager (POM)

\* Creating a new Pre-Screening Rule will require a DTS Request Ticket to the EMR Operations Team.

1. Launch Protocol Office Manager (POM)



- 2. Navigate the folder that you wish you create the protocol under.
- 3. Right-Click > Select New Protocol
- 4. Complete the following required fields:
  - Mnemonic Name of the protocol
  - Participation Type
  - Stratification Type
  - Enrolment Identifier: Either Manual or Automatic

New Protocol		×
File Task		
Mnemonic:	<ul> <li>Participation type:</li> </ul>	Enrollment Identifier
QRG-Protocol	Interventional V	Manually assigned
Program:	Stratification type: Net Stratified	Prefix: QRG-Protocol-
		Significant digits:     Next number:     Amendment Info <
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🥝 🛛 New Protocol

Edit/View Protocol

New Amendment

Edit/View AmendmentNew Revision

1 New Collaborating Site Protocol

Edit/View Revision

Cancel

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5. Click Save

