Research – Managing Milestones and Status in Protocol Office Manager (PO

This Quick Reference Guide will explain how to:

Manage milestones/approvals in Protocol Office Manager (POM) via pomanager.exe

- Mark protocols ready for accrual.
- Mark protocols as completed.

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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	Research –
		Creating a Protocol in Protocol
		Office Manager (POM)
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:	This QRG
the Protocol	 'Activated by' date populated 	
	 'Next Status' set to 'Open for Accrual' 	

Pomanager P2031

Update the milestone dates of the protocol

1. Launch Protocol Office Manager (POM)

2. Navigate through folder structure to locate the protocol to add or modify Milestones

- 3. Left click on the protocol
- 4. Select the 'Milestone' icon.

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If this this your first time adding the Milestone(s):

- 1. Select the default milestone applicable.
- 2. Select 'OK'.

Default Milestone X					
Default milestone list:					
Interventional Observational					
Other					
	OK	Cancel			



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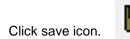








5. Populate the date for the relevant activity.



6.

🖾 Milestones for QRG-Protocol (Initial Protocol)					×			
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Amendment Status:		Activity	Responsible Party	Date Comple	ted			
In development	1	Approved by		**/**/****				
	2	Activated by		22/07/2023	* ~			
Next Status:	3	Completed by		**/**/****				
	4	Closed by		**/**/****				
Apply								

Update protocol status

Example: When a study is finished and is no longer active for recruitment, the status should be updated to 'Protocol Completed'.

From within the Milestone window

- 1. Click on the dropdown list for 'Next Status'.
- 2. Pick the option most applicable.
- 3. Click save icon.



Milestones for QRG-Pro	otocol (Initial Protocol)		– 🗆 X
Task Edit View Help				
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Amendment Status: In development Next Status: Amendment Approved Discontinued Invalid Upen to Accrual	1 2 3 4	Activity Approved by Activated by Completed by Closed by	Responsible Party	Date Completed **/**/**** 22/07/2023 **/**/**** **/**/****

