

Research – Managing Milestones and Status in Protocol Office Manager (POM)



Digital Health
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Quick Reference Guide

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.

! 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 the Protocol	Minimum entry to allow enrolment and screening: <ul style="list-style-type: none">• Principal Investigator• Study Coordinator• Coordinating Institute (Main WH location)	Research – Adding Roles to a Protocol'
Milestone Dates to the Protocol	Minimum entry to allow enrolment and screening: <ul style="list-style-type: none">• 'Activated by' date populated• 'Next Status' set to 'Open for Accrual'	This QRG

Update the milestone dates of the protocol

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



Pomanager_P2031

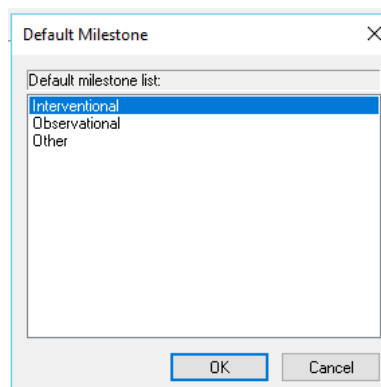
2. Navigate through folder structure to locate the protocol to add or modify Milestones
3. **Left click on the protocol**

4. Select the **'Milestone'** icon.



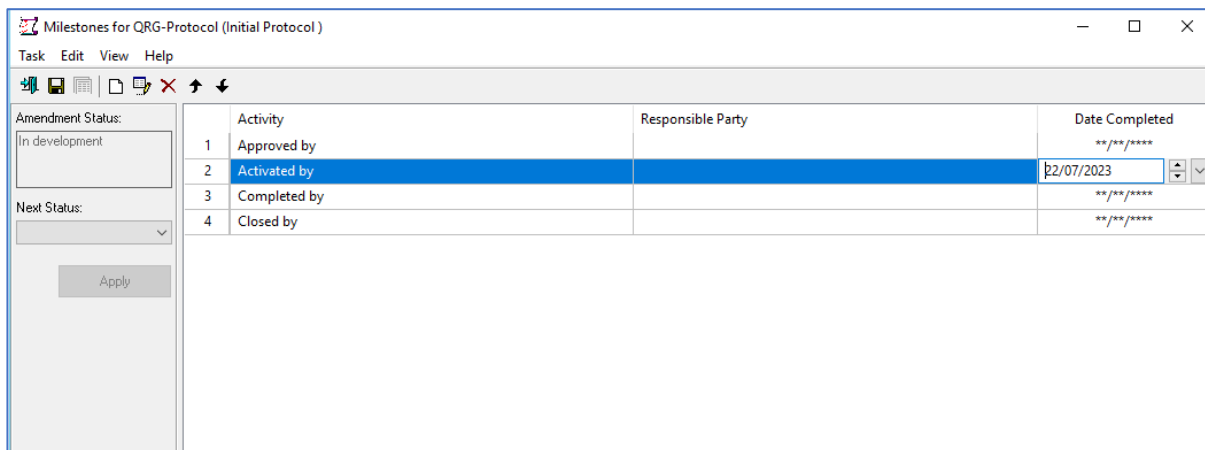
If this is your first time adding the Milestone(s):

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



5. Populate the date for the relevant activity.

6. Click save icon.



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Example: When a study is finished and is no longer active for recruitment, the status should be updated to 'Protocol Completed'.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

