PowerTrials: POM – associate checklists with consent forms

Quick reference guide

Creating Checklists

Checklists are created through *POM* and are used within various stages of patient interaction; for instance a Pre-Screening Checklist can be used to see if a potentially eligible patient meets any exclusion criteria for the study.

To see how to create checklists for a protocol, refer to the *POM x1 Create Checklist QRG*.

Associating Documents

The *Document Manager* is used to upload documents to your protocol in *POM*. Uploaded documents can be either internal for the research teams or external for other users of the EMR.

To see how to associate documents with a protocol, refer to the *POM 6 Associate Documents QRG*.

Associating Checklists

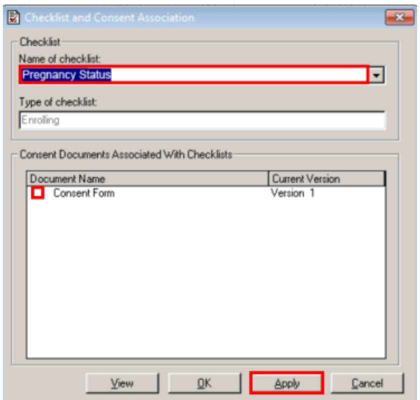
A Checklist can only be associated to the consenting process of a protocol.

From within *Document Manager*:

1. Select the consent form you are wishing to associate to a checklist.
2. Click the *Associate Checklists and Consents* icon.

The *Checklist and Consent Association* window will open.

3. Select the checklist to be associated from the *Name of checklist* dropdown menu.
4. Tick the checkbox beside the consent form.



5. Click *Apply*.

The *Checklist and Consent Association* window will go blank.

6. Click *Cancel* to return to the *Document Manager* window.