

PowerTrials: POM – associate documents with a protocol

Quick reference guide

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 ieMR.

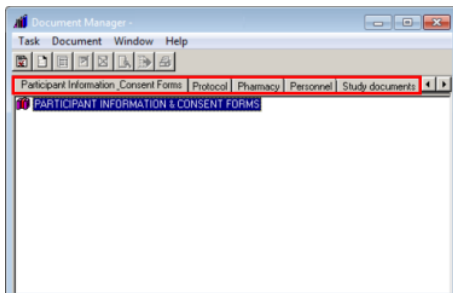
Note: To be able to open the protocol for accrual, a consent form and full protocol is required to be associated to it as a minimum within POM.

Associating Documents

1. With the relevant protocol or amendment selected from within the *Initiating Service* folder, click the *Document Manager* icon on the toolbar.

The *Document Manager* window will open.

2. Select the tab in accordance to the type of document that is to be uploaded.



3. Click the *Add New Document* icon.

The New Document window will open.

4. Name the document.

Note: Ensure the name does not exceed 40 characters. Consider adding a version number in the name to correspond with the paper version. The system provides basic version control, however only applies to the versions uploaded to *POM*, e.g. first version uploaded will always be *Version 1* in the system.

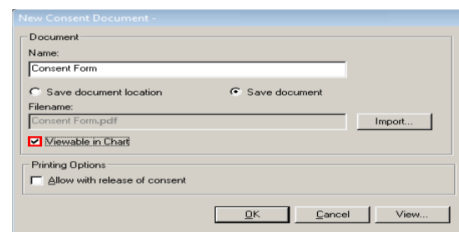
5. Click *Import*.

The *Open* window will launch.

6. Locate the document to be uploaded where it has been saved on the computer.

Note: The document is required to be uploaded in a PDF format otherwise they will not display correctly in *PowerChart*.

7. Click *Open*.
8. If the document is to be made viewable in the *Clinical Research* tab of the patient's EMR, ensure the checkbox beside *Viewable in Chart* is ticked.



Note: If this option is left unchecked, the document can only be viewed through POM Document Manager by other research staff with roles assigned to the protocol.

9. Under *Printing Options*, ticking the *Allow with release of consent* checkbox will allow users to print the uploaded forms when consenting the patient.
10. Click *OK*.

