

PowerTrials: POM – roles and primary contact

Quick reference guide

The Research team is required to have roles assigned against their protocol in *POM*. This task is required to be done prior to opening the protocol for accrual.

Note: The user who has created the protocol within POM will be automatically assigned the role of *Research Administrator* for that protocol. This can be modified if required **but must not be done before the Principal Investigator role is added to the protocol.**

Role Assignment

1. With the relevant protocol or amendment selected from within the *Initiating Service* folder, click the *Role Assignment* icon from the toolbar.

The *Roles associated with* window will open.

2. Select the role of the next person to be added to the protocol from the *Role name* drop down menu.

Note: Roles correspond with the actions and activities the user is authorised to complete within *POM* and *PPM*.

3. Select the role type of the role to be added to the protocol from the *Role type* drop down menu:
 - a. *Personal*: Role is being assigned to a person
 - b. *Organizational*: Role is being assigned to a Coordinating Institute
4. If *Personal* role type is selected, select the person to be added to the role by typing the person's name in the *Person name* text box.
Use the magnifying glass icon if required.

5. Leave *Position* blank.

Note: Adding a *Position* will allow all users with that position/role the ability to view or modify your protocol within *POM* – ensure the *Position* field is left blank.

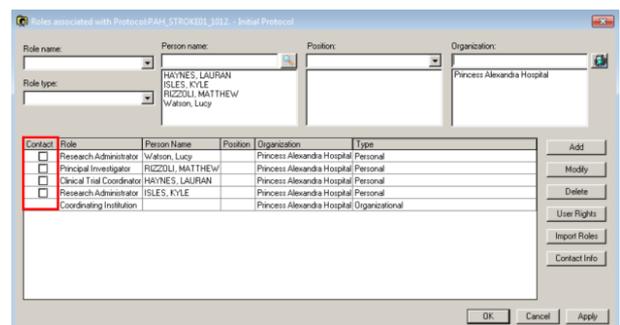
6. Click the *Organization Search* icon.
The *Organization Search* window will open.
7. Type Organisation details in the name field.
8. Click *Search*.
A list of matching results will display.
9. Select the correct Organisation from the list of results.
10. Click *OK*.
11. Click *Add*.

The Person/Organisation has now been assigned a role within the protocol.

Allocating a Primary Contact

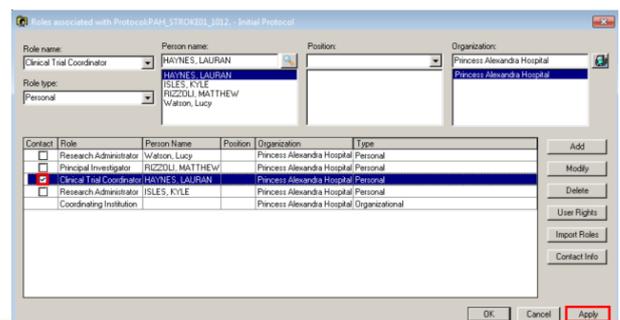
The primary contact for the protocol is selected through the *Roles associated with* window.

1. Tick the checkbox on the left hand side corresponding with the appropriate person.



Contact	Role	Person Name	Position	Organization	Type
<input type="checkbox"/>	Research Administrator	Watson, Lucy		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Principal Investigator	RIZZOLI, MATTHEW		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Clinical Trial Coordinator	HAYNES, LAURAN		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Research Administrator	ISLES, KYLE		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Coordinating Institution			Princess Alexandra Hospital	Organizational

2. Click *Apply* to finalise the selection.



Contact	Role	Person Name	Position	Organization	Type
<input type="checkbox"/>	Research Administrator	Watson, Lucy		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Principal Investigator	RIZZOLI, MATTHEW		Princess Alexandra Hospital	Personal
<input checked="" type="checkbox"/>	Clinical Trial Coordinator	HAYNES, LAURAN		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Research Administrator	ISLES, KYLE		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Coordinating Institution			Princess Alexandra Hospital	Organizational



3. The *Contact Info* button can be used to confirm contact details recorded for the selected person.

Contact	Role	Person Name	Position	Organization	Type
<input type="checkbox"/>	Research Administrator	Watson, Lucy		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Coordinating Institution			Princess Alexandra Hospital	Organizational
<input type="checkbox"/>	Research Administrator	ISLES, KYLE		Princess Alexandra Hospital	Personal
<input checked="" type="checkbox"/>	Clinical Trial Coordinator	HAYNES, LAURAN		Princess Alexandra Hospital	Personal
<input type="checkbox"/>	Principal Investigator	RIZZOLI, MATTHEW		Princess Alexandra Hospital	Personal

Note: *Contact Info* is pulled from the contact details recorded against the selected user's Novell. If details require changing, a job will need to be logged through the Info Service Centre.

4. Click *OK* to close the window.

