

Clinical Research staff will import a document into the protocol that includes contact information for the identified points of contact for the specific study. This will allow for providers or clinicians providing care to the patient accurate contact information to someone on the clinical research team involved in the study for more information.

Importing Contact Information Document

STEP 1: Create a folder on the desktop of device that the contact information documents are saved.

STEP 2: Using Microsoft Word, create a document with the Study name and contact information to have listed for the study.

- Save the document to the folder created on the desktop.
- Convert the file to a PDF.

STEP 3: Login to **Protocol Office Manager**.

STEP 4: Locate and select the protocol to import the contact information document.

STEP 5: Click the **Document Manager** icon. 

STEP 6: Click the **Add New Document**.

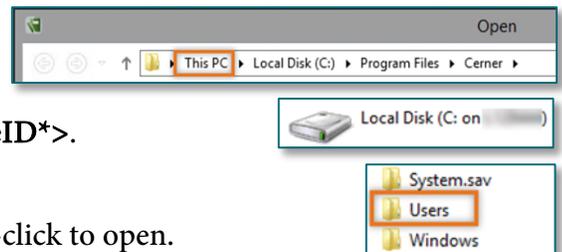
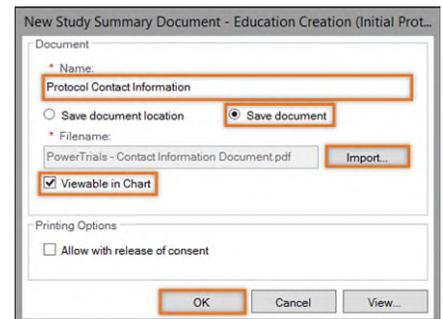
STEP 7: Enter a Document Name: **Contact Information**.

STEP 8: Verify the **View in Chart Option** is selected.

STEP 9: Select the **Save Document** option and then select **Import**.

STEP 10: To locate the document saved on the desktop:

- Click **This PC** in the address bar.
- Double-click the **Local Disk: (C: on <*your deviceID*>**.
- Double-click the **Users** folder.
- Locate the folder with network sign on and double-click to open.
- Double-click the **Desktop** folder. 
- Find the folder the contact information was saved in, select the document, and then click **Open**.



STEP 11: Click the **OK** button.

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket](#) to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.