For scenarios where the roles in a protocol need to be updated, such as staff needing to be removed, replaced, or added, follow the steps outlined below.

Maintaining Roles on Protocols

Protocol Office Manager
PowerTrials

STEP 1: Login to **Protocol Office Manager (POM)**.

STEP 2: Click the **Maintain Roles** icon on the toolbar.

- Select one of the three tabs based on the need for updating roles: **Inactivate Person, Inactivate and Replace Person,** or **Add Person**

➢ **To Add a Person**

STEP 3: In the **Maintain Roles On Protocols** window, go to the **Add Person** tab.

STEP 4: In the **Person** field, click the search icon and search for the name of the person to add.

STEP 5: In the **Role name** field, select the applicable role (e.g., Research Administration, Research Nurse).

STEP 6: Select the protocol(s) from the list to assign a role.

- If adding a person to more than one study, **press and hold the CTRL** key on the keyboard and select the applicable protocols.

- If adding a person to **ALL** the protocols, click **Select All**.
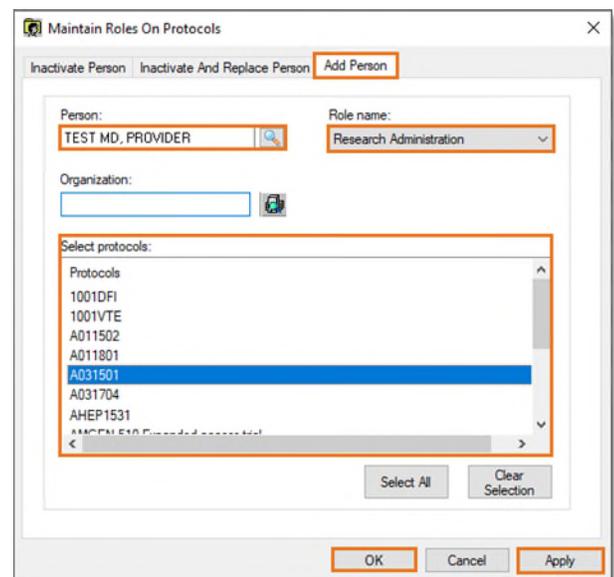
STEP 7: When finished, click **Apply**.

STEP 8: Click **OK**.

STEP 9: To review and verify the new person has been assigned a role for the protocol:

- Select the protocol in the protocol tree.

- In the **Protocols/Amendments** navigator pane, click **Protocol Roles**.

- Role assignments for the protocol display.