

From the Office of Health Informatics PowerTrials – Protocol Office Manager Maintaining Roles on Protocols

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otocol Office Manager

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

- **<u>STEP 1</u>**: Login to **Protocol Office Manager (POM)**.
- **<u>STEP 2</u>**: Click the **Maintain Roles** icon whete 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
- **<u>STEP 3</u>**: In the **Maintain Roles On Protocols** window, go to the **Add Person** tab.
- **<u>STEP 4</u>**: In the **Person** field, click the search icon and search for the name of the person to add.
- <u>STEP 5</u>: In the **Role name** field, select the applicable role (e.g., Research Administration, Research Nurse).
- **<u>STEP 6</u>**: 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.
- **<u>STEP 7</u>**: When finished, click **Apply**.
- STEP 8: Click OK.
- **<u>STEP 9</u>**: 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.

vate Person Inactivate And Replace I	Person Add Person
Person:	Role name:
TEST MD, PROVIDER	Research Administration ~
O	
Organization:	
6	2
Select protocols:	
Protocols	^
1001DFI	
1001VTE	
A011502	
A011801	
A031501	
A031704	
AHEP1531	
AMOTH 510 F	
	,
	Select All Clear
	Selection



For questions regarding process and/or policies, please contact your unit's Clinical Educator or Health Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.