

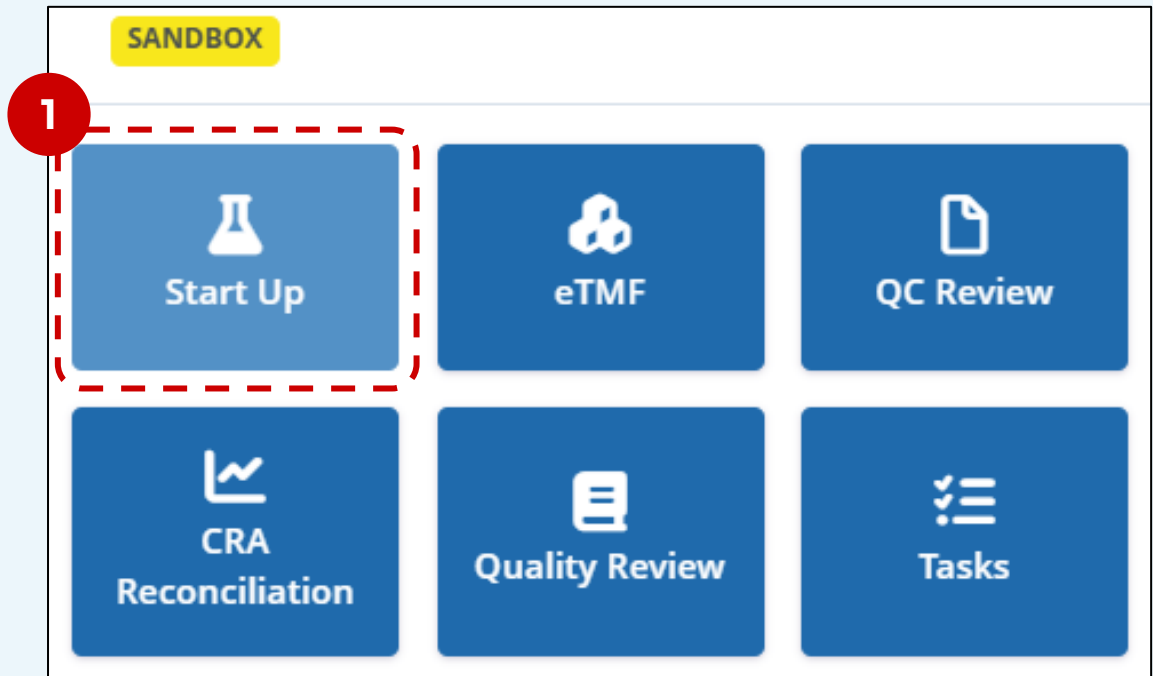
How to Create Contacts for SSU

TI version 10.8

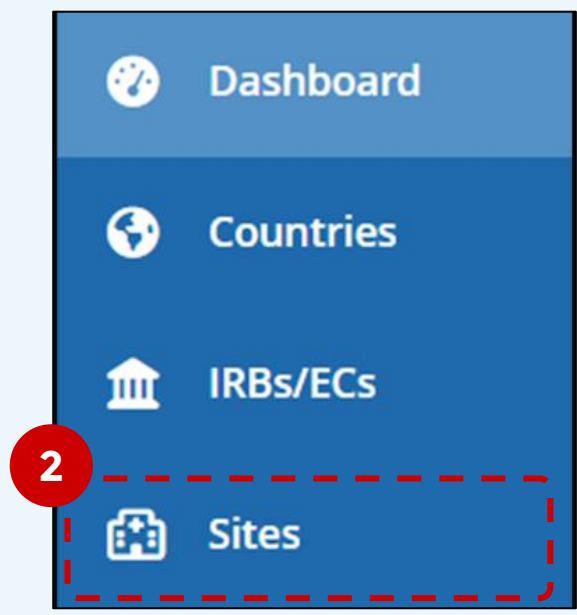
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- SSU
- eTMF

1 Enter a room and navigate to the **Start-Up** area.



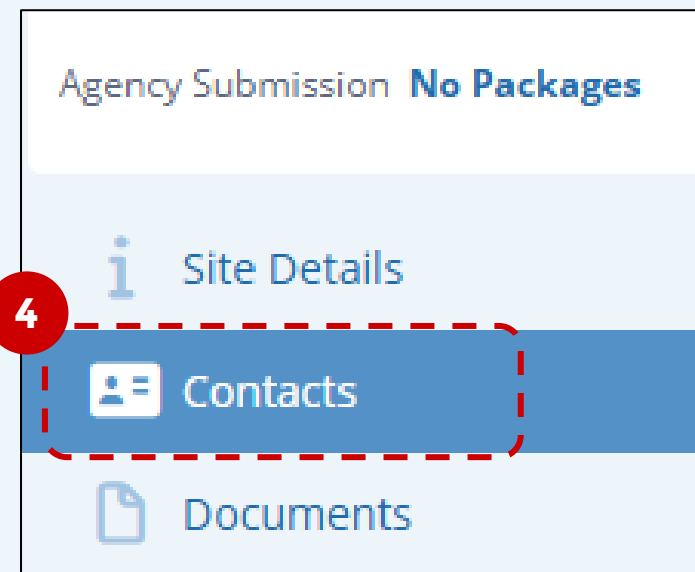
2 Select the **Sites** section from the Navigation Bar. This will display the list of Countries for the study.



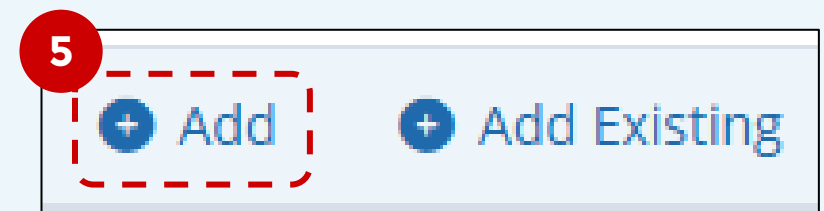
3 Select a **Site** by clicking on its name.

43 Sites			Site	Status
<input type="checkbox"/>				
<input type="checkbox"/>	★	...	GBR Jane Doe	NON PARTICIPATI
<input type="checkbox"/>	★	...	GBR 7001 Pepper Mint	ACTIVE

4 Select the **Contacts** button in the left-hand panel to display all contacts related to the Site.

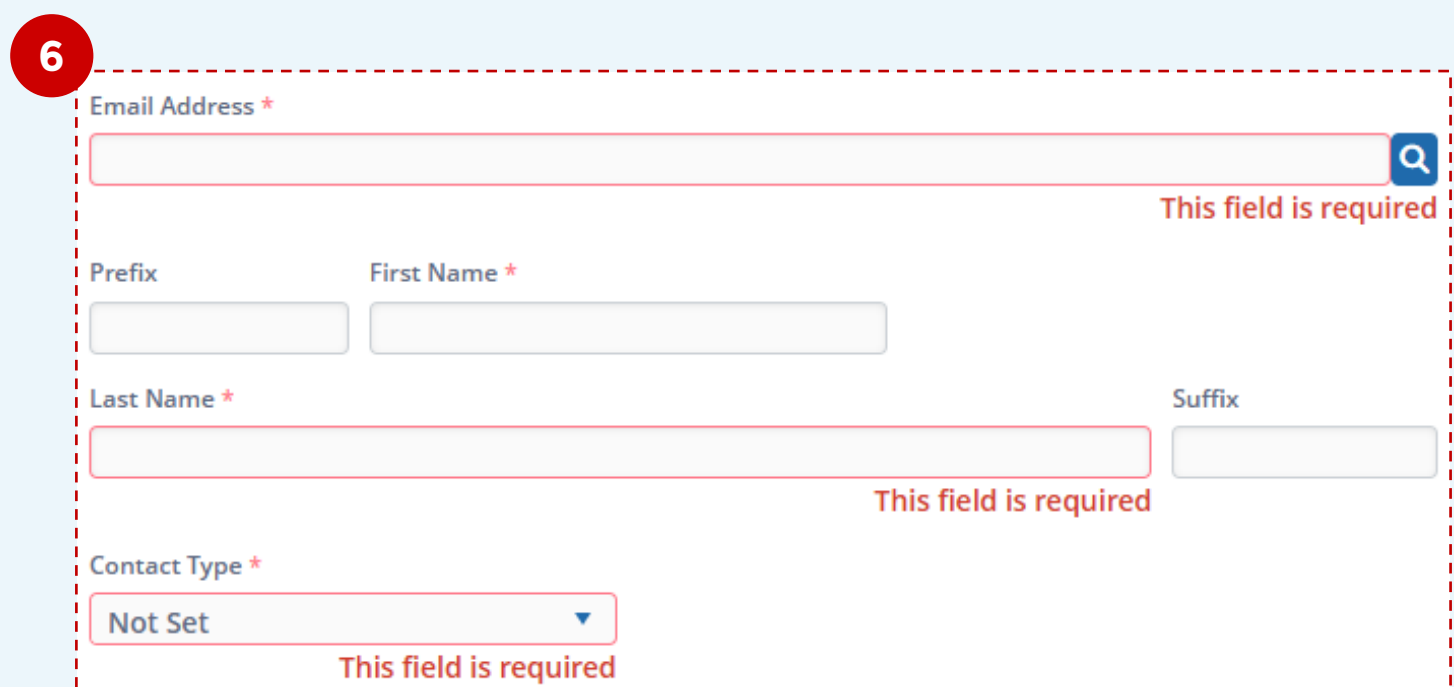


5 Click on **Add** or **Add Existing** in the menu bar. **Add Existing** allows the user to select any contact already in the data bank (perhaps a contact at another site). For this example, we will display the **Add** menu.



6 In the **Create New Contact** window, add the essential details (email, identity, contact type).

Contact Types available may vary from room to room. Contact an Admin if you do not see the Contact Type you need.



The screenshot shows the 'Create New Contact' form with the following fields: 'Email Address *' (with a search icon and 'This field is required' text), 'Prefix' and 'First Name *' (with 'This field is required' text), 'Last Name *' (with 'This field is required' text) and 'Suffix', and 'Contact Type *' (with a dropdown menu showing 'Not Set' and 'This field is required' text). A red dashed box encloses the entire form, and a red circle with the number '6' is positioned to the left of the top of the form.

7 Use **toggles** to designate as Main Contact (one per site) and/or whether the Contact will be paired with requirements ('Contact is responsible for providing documents').

8

Set as Main Contact

Contact is responsible for providing documents

When the 'Responsible for Providing Documents' toggle is selected, any requirements that match the Contact Type (ex. *Curriculum Vitae* for Sub-Investigators) will be added automatically to the site requirements, for this contact and any other contact that matches the same Contact Type. This removes the need to manually add requirements for each new entry.

8 Add **location** and phone information (optional). You can also auto-complete using the selected Site's address.

8

Address

Use Site Address

Address

City

9 Click on **Add** to complete the operation and close the window. If you wish to create more contacts, you can click **Save and Create Another** to keep the window open.

9

Cancel Save And Create Another Add