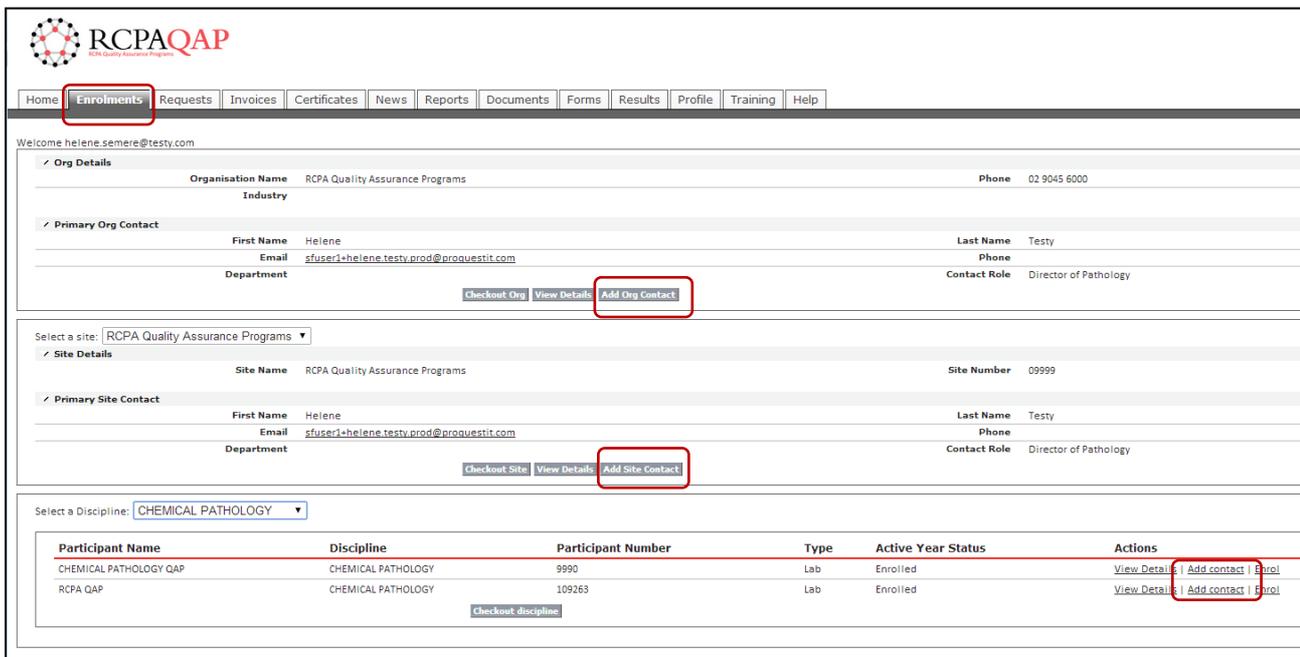


## HOW TO: Maintain Contact Information

The primary contacts with 'Portal Full Access' profile are the users who can maintain contact information. The following level of primary contacts determines their access;

- **Organisation Contact** – will have visibility of all contacts of the Organisation. This user can add and or update contacts at the Organisation, Site and Participant level.
- **Site Contact** – will have visibility across all participants' contacts listed under that particular site. The primary contact can add contacts at the Site/Participant level).
- **Participant Contact** – will have visibility of the contacts in that participant only. The primary contact participant contact will be able to add or update contacts at the participant level.

From the Home page, select 'Enrolments' tab and click the "Add Contact" option at the level you need to do an update, as per below;



Welcome helene.semere@testy.com

Home **Enrolments** Requests Invoices Certificates News Reports Documents Forms Results Profile Training Help

**Org Details**

Organisation Name: RCPA Quality Assurance Programs Phone: 02 9045 6000

Industry:

**Primary Org Contact**

First Name: Helene Last Name: Testy  
 Email: sfuser1+helene.testy.prod@proquestit.com Phone:  
 Department: Contact Role: Director of Pathology

Checkout Org View Details **Add Org Contact**

Select a site: RCPA Quality Assurance Programs

**Site Details**

Site Name: RCPA Quality Assurance Programs Site Number: 09999

**Primary Site Contact**

First Name: Helene Last Name: Testy  
 Email: sfuser1+helene.testy.prod@proquestit.com Phone:  
 Department: Contact Role: Director of Pathology

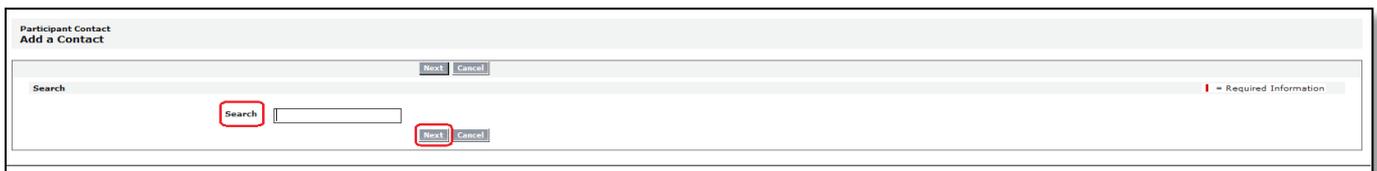
Checkout Site View Details **Add Site Contact**

Select a Discipline: CHEMICAL PATHOLOGY

Participant Name	Discipline	Participant Number	Type	Active Year Status	Actions
CHEMICAL PATHOLOGY QAP	CHEMICAL PATHOLOGY	9990	Lab	Enrolled	View Details   <b>Add contact</b>   Enrol
RCPA QAP	CHEMICAL PATHOLOGY	109263	Lab	Enrolled	View Details   <b>Add contact</b>   Enrol

Checkout discipline

When the 'Add contact' button is selected, a search bar will appear allowing a search to be performed to see if the contact already exists in the system. If the contact already exists, they can then be associated to the relevant Organisation/Site/Participant. If the contact does not exist, click 'Next' and the screen to create a new contact profile will be displayed.



Participant Contact  
Add a Contact

Next Cancel

Search

Search  **Search**

Next Cancel

Required Information

Please note that the sections highlighted with a red bar (particularly the e-mail address section) are mandatory fields. This information is crucial in order to log in and receive e-mail reminders and notifications.

Participant Contact  
Add a Contact

Contact Details

Salutation: --None--

First Name:

Last Name:

Email:

Mobile:

Phone:

Department:

Contact Role: --None--

myQAP

Primary Contact:

myQAP access level: myQAP Portal Limited Access

**I = Required Information**

Please remember to click **'Save'** to update the details. Each contact that is created will be granted automatic customer portal access. If participants are unable to add a contact due to access level restrictions, and are unable to reach the current primary contact to initiate access, please log a 'Request' in myQAP for assistance.