

HOW TO: Maintain Contact Information

The primary contacts 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 for that participant only.
- **Primary Contact** - can manage contact information for their participant. The primary contact can add or update all contacts at a participant level including amending the 'primary contact' and active status for participant contacts.

Note: It is critical that contact information and access to our systems are kept up to date. If a contact leaves your organisation, contact the RCPAQAP Customer Service team promptly to ensure correct deactivation.

From the Home page, select the 'Enrolments' tab and click the "Add Contact" option at the level you need to perform the update, as per below (Figure 1 – Organisation Contact, Figure 2 – Participant Contact);

Figure 1: Illustrates the Enrolments page for a Participant Contact at the Organisation level

The screenshot shows the RCPAQAP Enrolments page. At the top, there is a navigation menu with tabs: Home, **Enrolments**, Result Entry, Data Analysis, Requests, Invoices, Certificates, News, Reports, Documents, Forms, Profile, Training, Calendar, and Help. Below the navigation is a notification banner: "46 enrolments under CHEMICAL PATHOLOGY are waiting to be checked out. Please generate an invoice to finalise your enrolment." The user is logged in as ray.oreo@test.com. The page is divided into three main sections:

- Org Details:** Shows Organisation Name (RCPA Quality Assurance Programs), Industry, and Primary Org Contact (Susan, rcpaqapserology@gmail.com). A red box highlights the "Add Org Contact" button.
- Site Details:** Shows Site Name (RCPA Quality Assurance Programs), Site Number (09999), and Primary Site Contact (Susan, rcpaqapserology@gmail.com). A red box highlights the "Add Site Contact" button.
- Participants Table:** A table with columns: Participant Name, Discipline, Participant Number, Type, Active Year Status - 2018, and Actions. The table lists four participants: RCPA QAP, Martyn Peck Monitor, RCPA QAP, and TEST 1 RAY. A red box highlights the "Add contact" button in the Actions column for the first participant.

Figure 2: Illustrates the Enrolments page for a Participant Contact at the Participant level

Welcome fernando1.estepa@rcpaqap.com.au

Org Details
 Organisation Name: RCPA Quality Assurance Programs
 Industry:
 Phone: 02 9045 6000

Primary Org Contact
 First Name:
 Email:
 Department:
 Last Name:
 Phone:
 Contact Role:
 View Details

Select a site: RCPA Quality Assurance Programs
 Site Details
 Site Name: RCPA Quality Assurance Programs
 Site Number: 09999

Primary Site Contact
 First Name: Susan
 Email: rcpaqapsereology@gmail.com
 Department: Serology
 Last Name: Badman
 Phone: 02 9045 6070
 Contact Role: Laboratory Manager
 View Details

Select a Discipline: HAEMATOLOGY

Participant Name	Discipline	Participant Number	Type	Active Year Status - 2018	Actions
RCPA QAP	HAEMATOLOGY	999	Lab	Enrolled	View Details Add contact Enrol

Generate Discipline Invoice(s)

When the 'Add contact' button is selected, a search bar will appear (Figure 3) 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.

Figure 3

Participant Contact
Add a Contact

Search

! = 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 (Figure 4).

Figure 4

Participant Contact
Add a Contact

Search

Save ! = Required Information

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
 Save

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.