

APPLICABLE TO:

- Administrators
- eTMF
- Room Managers
- Study Start-Up
- Editors
- myTI
- Readers

1. Log in to a room and navigate to the **Sites** module.



2. Select the site you want to add contacts to, using the *View Selector* pane on the left.

The screenshot shows the 'eTMF / Sites' interface. On the left is a 'View Selector' pane with a tree view containing 'All', 'Active 13', 'Non Participating 2', and 'Pending 34'. The 'Active 13' folder is selected. The main table displays a list of sites with columns for checkboxes, actions (dots and star), 'Site Nu...', and 'Principal Investigator'. The row for '2275' with 'Molly T'Cat' as the Principal Investigator is highlighted with a red box.

		Site Nu...	Principal Investigator
<input checked="" type="checkbox"/>	... ☆	2275	Molly T'Cat
<input type="checkbox"/>	... ☆	Carol	Carol Juvenal

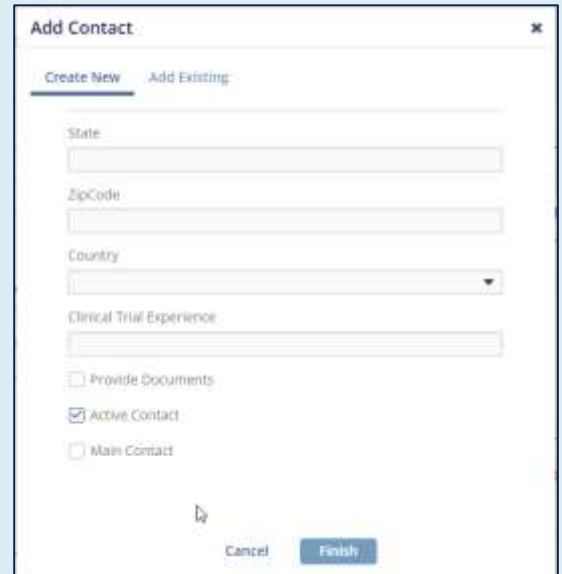
3. In the *Site* pane (bottom section of the interface), switch to **Contacts** then click **Add**.

The screenshot shows the 'Site' pane with tabs for 'General Info', 'Contacts', and 'Site Visits'. The 'Contacts' tab is active. Below the tabs is a toolbar with buttons: '+ Add', 'Edit', 'Delete', 'Deactivate', and 'Convert to User'. The '+ Add' button is highlighted with a red box. Below the toolbar are input fields for 'Last Name' and 'First Name'.

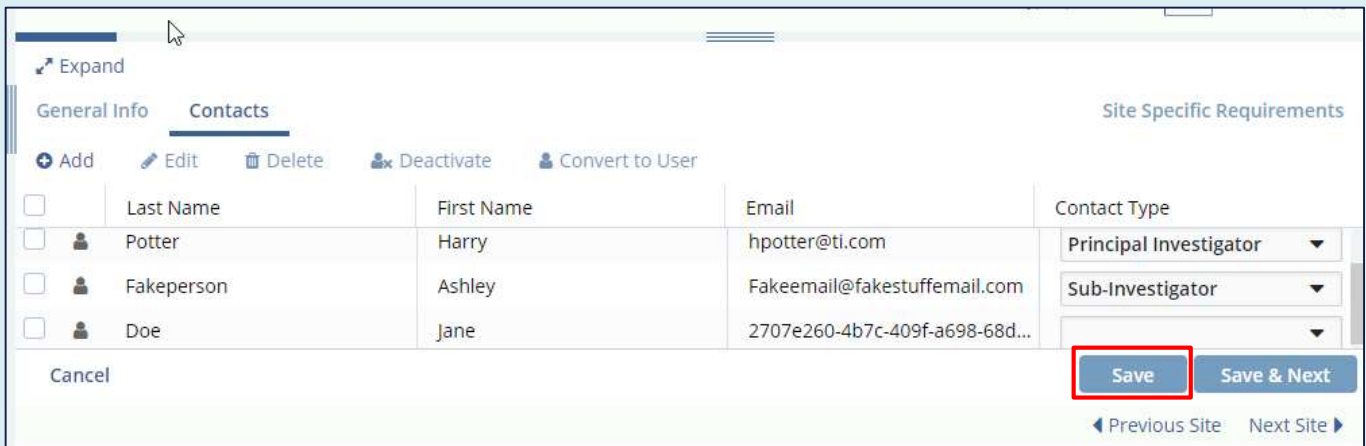
4. Fill in the required information to create a new contact, or switch to **Add Existing** if the person is already a contact in the room.

[optional] Check **Provide Documents** if required documents will be assigned to this Contact.

Click **Finish** to assign the contact to the selected site.



5. After adding one or more Contacts, always click **Save**.

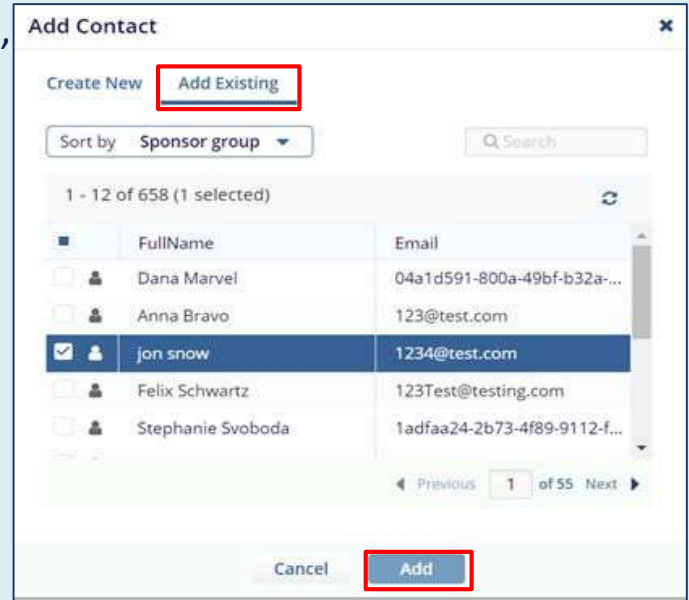


	Last Name	First Name	Email	Contact Type
<input type="checkbox"/>	Potter	Harry	hpotter@ti.com	Principal Investigator
<input type="checkbox"/>	Fakeperson	Ashley	Fakeemail@fakestuffemail.com	Sub-Investigator
<input type="checkbox"/>	Doe	Jane	2707e260-4b7c-409f-a698-68d...	

5b. To add previously created contacts, click **Add Existing**.

Select the contact from the Sponsor Group or Investigative Site Group.

Click **Add**.



6. When finished adding Contacts, click **Save**.



If you are using SSU to manage sites, see the related job aid **SSU How to Assign Contacts**.