Managing Health Care Providers - Include v1.1.3

Each person in the P/O Curation Portal must be identified uniquely in the current role.

Information on Tab Labels

The Person Details page displays all details about the person provided to date. The tab labels in the Assign Organizational Roles section at the bottom of the page display the number of each role already associated with the person that you are curating (if applicable). The letter "*P*" beside the role label on each of the tabbed pages indicates that at least one role is pending curation.

How to Manage Health Care Providers

- 1. Navigate to the record of interest. See Navigating Records in Tables or Searching for Person Records.
- 2. In the Action column for a given person, click Curate.
- 3. In the Assign Organizational Roles section toward the bottom of the Person Details page, click the HCP (Health Care Provider) tab. The HCP page displays the research roles currently assigned to the organization (if applicable).

You can sort the records

Click the column heading once to sort the records in ascending order. An arrow head indicates whether the sort order is descending or ascending. Click the column heading again to reverse the sort order.

Assign Organizational Roles						
CRS (3) P	HCP (2) P OC (1	I) P OPI (1)				
<u>ID</u> マ	Affiliated Organization ID	Affiliated Organization Name	<u>Role</u> <u>Status</u>	<u>Status</u> Date	Action	
17371764	56231	Cancer and Leukemia Group B	PENDING	2011-07-22	🥒 Edit	
269237	181303	Ohio State University Medical	ACTIVE	2008-12-31	🥒 Edit	
2 items fou	nd, displaying all iter Health Care Provi	ns. der				

Manage Health Care Provider(s) Page-Assign Roles

4. Follow one of the options in the table below to continue assigning roles: Options for assigning roles to a person

If there are	And	Do this
No health care provider role records displayed	You want to add a role	Proceed to the next step.
One or more health care provider role records displayed	The information for them is correct	Proceed with other aspects of the person curation.
One or more health care provider role records displayed	The information for them is incorrect	In the Action column for the record you want to modify, click Edit , and proceed to Select Affiliated Organization.

^{5.} To add a role, click **Add Health Care Provider**. The Create Health Care Provider page appears.

Create Health Care Provider						
Health Care Provider Information						
Person Information						
Person ID: Status: Status Date: 445932 ACTIVE 2009-01-21						
First Name: Middle Name: Last Name: Gh <i>as</i> san Abou-Alfa						
Email Addresses						
Health Care Provider Role Information						
* Affiliated Organization ID: 🔍 Select Affiliated Organization						
* Role Status: PENDING						
Certificate/License Information:						
Address Information						
No Postal Address(es) found.						
Add Postal Address						

Create Health Care Provider Page - Role Information

6. Click Select Affiliated Organization.

The Find Organization(s) page appears.7. Search for and select the affiliated organization. For instructions on finding organizations, see Searching For Organization Records.

- The organization you selected is displayed in the Health Care Provider Role Information section. 8. From the **Role Status** drop-down list, select the curation status of the organization role. If you have supplied all the necessary information, select Active.
- 9. Optionally, in the Certificate/License Information field, enter the appropriate number.
- 10. In the Address Information section, click Add Postal Address, and follow the instructions in Entering Address Information. The information appears in the Address Information section.

Address Information
Address 1
Country:
United States
Address Line 1:
123 Bayview
Address Line 2:
City:
San Francisco
State or Province: Postal Code:
CA 56994
Contraction Edit Remove
Add Postal Address

- Address Information Section
- 11. Do one of the following to continue:
 - a. To change the information in the address section, click Edit.

 - or -b. To delete the address information, click **Remove**.
 - or -
- c. To add another address, click Add Postal Address.
 12. Complete the remaining Contact Information fields. If you provide an email address, you are not required to provide a phone number, and vice versa.

Remember to click Add after you complete each of the contact information fields. ${ \oslash }$

13. Click Save, then click Return to Person Details.