

# 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) P

OPI (1)

ID	Affiliated Organization ID	Affiliated Organization Name	Role Status	Status 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 found, displaying all items.

Add Health Care Provider

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 <b>Action</b> column for the record you want to modify, click <b>Edit</b> , and proceed to <a href="#">Select Affiliated Organization</a> .

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: 445932

Status: ACTIVE

Status Date: 2009-01-21

First Name: Ghassan

Middle Name:

Last Name: Abou-Alfa

Email Addresses

unknown@example.com

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

 **Edit**  **Remove**

 **Add Postal Address**

*Address Information Section*

11. Do one of the following to continue:

- To change the information in the address section, click **Edit**.  
- or -
- To delete the address information, click **Remove**.  
- or -
- 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.

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