Managing Organizational Contacts - Include v1.1.3

You must identify each organization, including each organizational contact, uniquely.

> **Information on Tab Labels**
>
> The Organization Details page displays all details about the organization 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 organization that you are curating (if applicable). The letter "*P*" beside the role name on each of the tabbed pages indicates that at least one role is pending curation.

How to Manage Organizational Contacts

1. Navigate to the record of interest.
2. In the **Action** column for a given organization, click **Curate**.
3. In the **Assign Organization Roles** section toward the bottom of the **Organization Details** page, click **the Org Contact** (Organizational Contact) tab.

> **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.

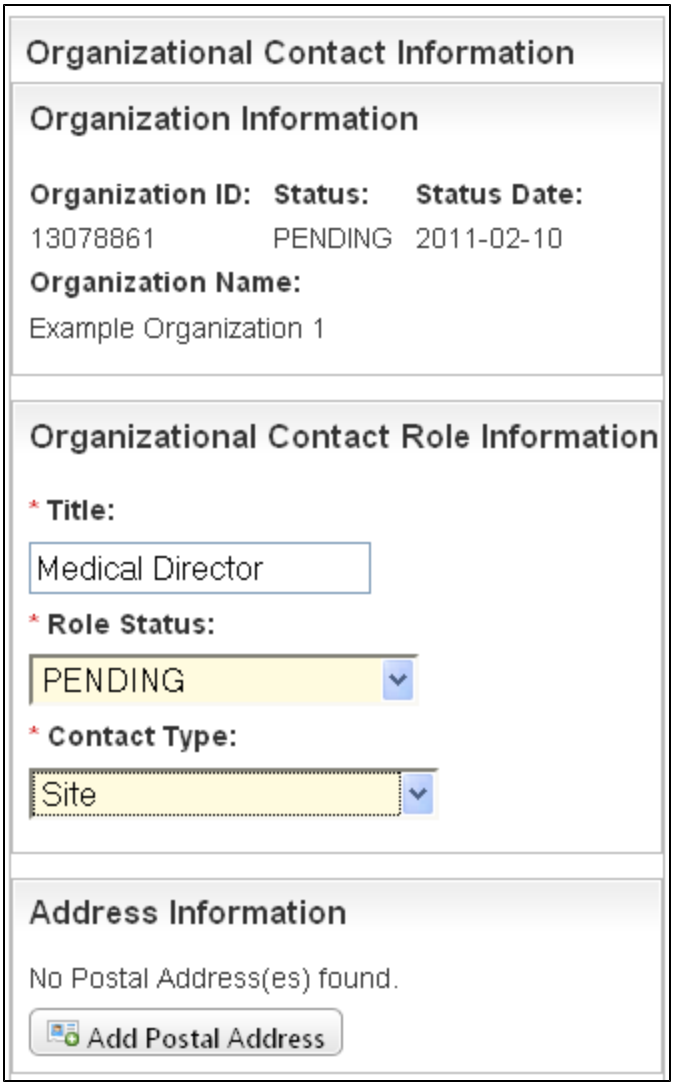
The Org Contact page displays the research roles currently assigned to the organization (if applicable).

Assign Organizational Roles - Organizational Contacts Tab

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

If there are...	And...	Do this
No organizational contact records displayed	You want to add a role	Proceed to the next step.
One or more organizational contact records displayed	The information for them is correct	Proceed with other aspects of the organization curation.
One or more organizational contact records displayed	The information for them is incorrect	In the **Action** column for the record you want to modify, click **Edit**, and proceed to the table below.

5. To add a role, click **Add Organizational Contact**.
   The Create Organizational Contact page appears.



Create Organizational Contact Page – Upper Sections

6. Select or enter the appropriate information in the text fields and drop-down lists. Fields are described in the following table. Items with an asterisk are required fields.

Field Label	Description/Instructions
Title*	Type the title of the contact role.
Role Status*	If the associated contact has not been curated (i.e., it is pending), select **Pending**. Otherwise, select **Active**.
Contact Type*	Select the appropriate contact type. Valid values are as follows: • IRB • Responsible Party • Site

7. In the **Address Information** section, click **Add Postal Address**, and follow the instructions in Entering Address Information.
8. Click **Save**.
   The information appears in the Address Information section on the Create Organizational Contact page.

Create Organizational Contact – Address Information Section

9. 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**.
10. Complete the remaining **Contact Information** fields.

> Remember to click **Add** after you complete each of the contact information fields.

11. Click **Save**, then click **Return to Organization Details**