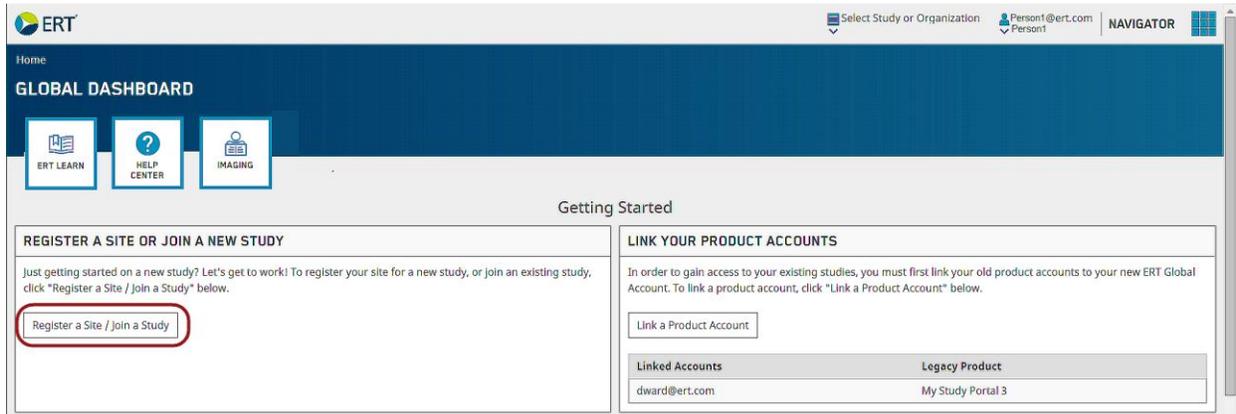


HOW DO I JOIN, REGISTER AS A SITE ADMINISTRATOR, AND SUBMIT A SQF FOR ERT PORTAL

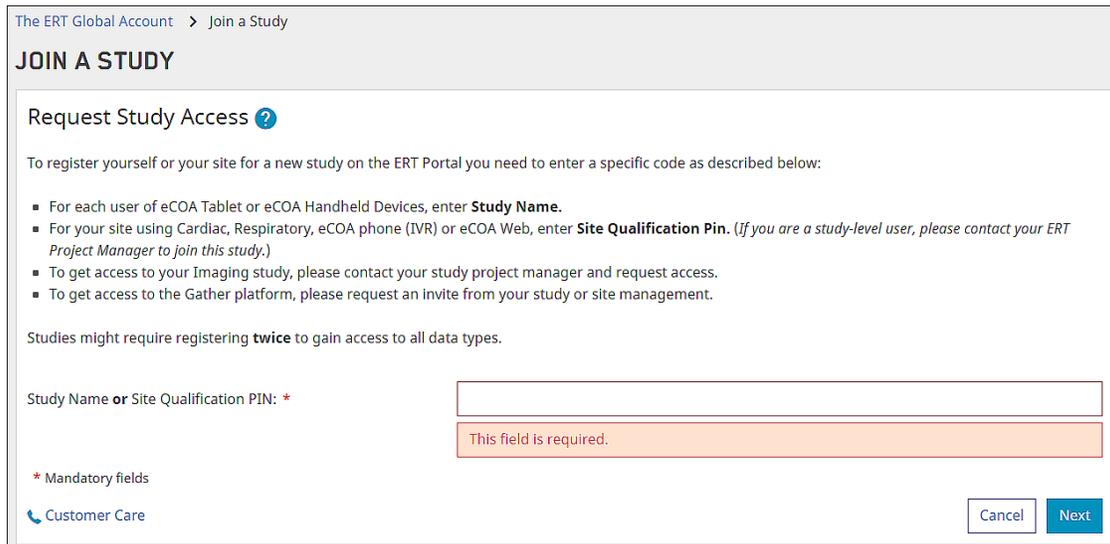
1. Navigate to the address: <https://gssso.ert.com> and click the **Register a Site/Join a Study** button.

Note: If you do not already have an ERT Global Account, please refer to the online Quick Guide or topic titled **“How do I create an ERT Global account?”** located in the ERT Global Account online help.



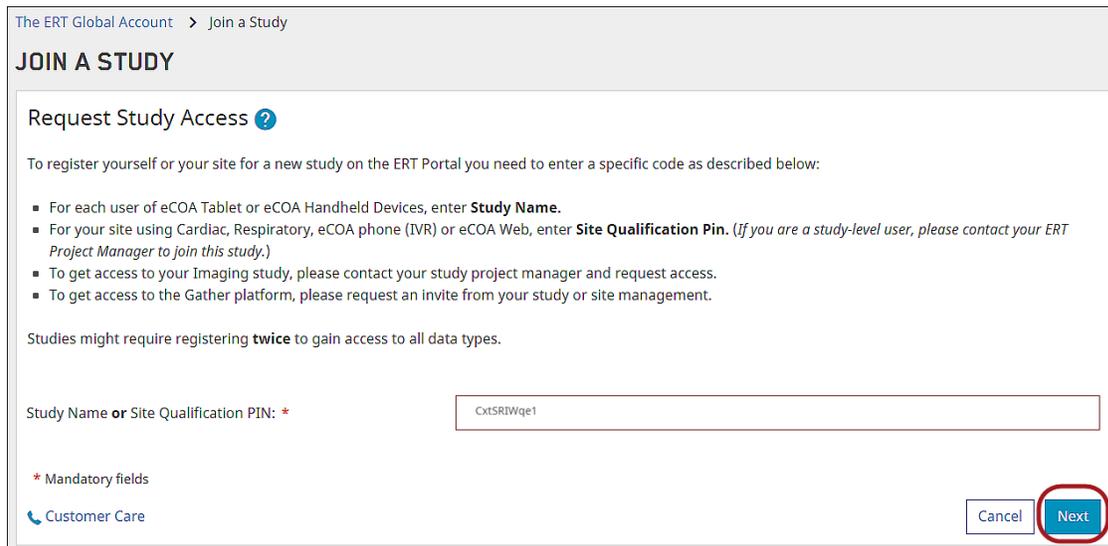
The **Join a Study** window opens.

Note: Mandatory fields that must be selected are indicated with a red asterisk (*).



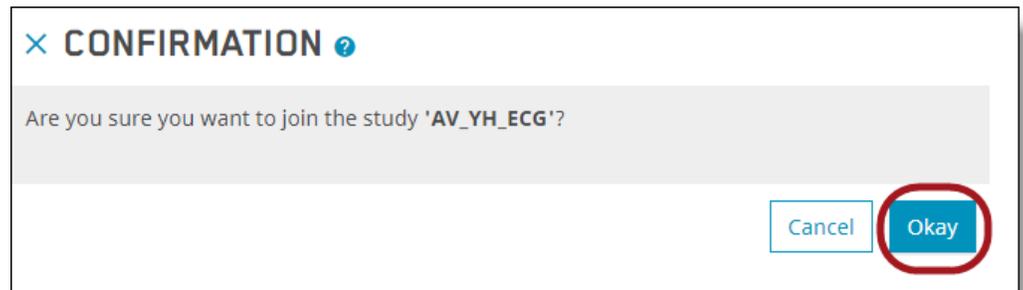
The screenshot shows the 'JOIN A STUDY' window. At the top, there's a breadcrumb 'The ERT Global Account > Join a Study'. Below this is the title 'JOIN A STUDY' and a sub-section 'Request Study Access' with a help icon. The main text says 'To register yourself or your site for a new study on the ERT Portal you need to enter a specific code as described below:'. There are three bullet points: 'For each user of eCOA Tablet or eCOA Handheld Devices, enter Study Name.', 'For your site using Cardiac, Respiratory, eCOA phone (IVR) or eCOA Web, enter Site Qualification Pin. (If you are a study-level user, please contact your ERT Project Manager to join this study.)', and 'To get access to your Imaging study, please contact your study project manager and request access.' and 'To get access to the Gather platform, please request an invite from your study or site management.' Below this, it says 'Studies might require registering twice to gain access to all data types.' There is a form field for 'Study Name or Site Qualification PIN: *' which is empty and has a red border. Below the field is a red message box that says 'This field is required.' At the bottom left, there's a link for 'Customer Care'. At the bottom right, there are 'Cancel' and 'Next' buttons.

2. In the **Join a Study** window, enter the Site Qualification PIN and click **Next**.



3. A message displays to confirm you are joining the proper study. Click **Okay**.

Note: *This message may be different depending on which services are contracted for the study.*



Note: *If you do not have an ERT Portal account linked with your ERT Global Account, the **Have an Account** window displays. If you currently have an account, click **Yes**, then click **Next**, and follow the on-screen instructions. If you do not currently have a portal account, click **No** and follow the on-screen instructions. Should you receive an **Edit Contact Information** screen, update all mandatory fields with a red asterisk * and click **Submit** to proceed.*

After you complete the previous step, a message specifying the study is being joined displays. No action is required on this window as it is automated.



4. After you complete the Join A Study process and/or log in and select the **New SQF** button, a window displays that shows the necessary prerequisites for submitting a SQF. Please read the entire page before proceeding.

5. After reading the prerequisites, you can either click **Continue with Site Registration**, if you have all items you need, or click **Not ready to start yet**, if you need additional information.

INFORMATION NEEDED FOR THE SITE QUALIFICATION FORM

Registering Site for Study: AV_YH_ECG (049961)

Before submitting the Site Qualification Form, please be sure to have the following information:

- Site ID (Sponsor's identification number for your site for this study)
- Principal Investigator name, street address, phone number & email address
- Contact person to receive shipments of equipment and supplies (name, street address, phone number & email address)
- Contact person or people to receive reports (name & email address)
- Contact person or people to receive query notifications (name & email address)
- For COA/ePRO studies, please have the names & email addresses of the primary and secondary alert receivers to receive alert notifications

Also, be prepared to answer questions about the site's phone system such as:

- Do you have access to an analog line for ECG transmission?
- Does that line need to dial a number to access an outside line? (e.g. "9" or "0")
- What number must be entered to dial an outside line?
- Does that line have a dial tone?

Not ready to start yet
Continue with Site Registration

5a. If you continue, follow Steps 1 *through* 5 in the **Site Qualification Wizard**.

For **Step 1: Site Information**, fill in the requested site information and click **Next** when finished.

Note: By agreeing to be included in ERT's Site Data Warehouse, you will participate in sharing your profile information with clinical trial sponsors seeking investigators to support clinical trials. Further information will be emailed to the Principal Investigator's email provided on the Site Qualification Form. (Optional)

SITE QUALIFICATION WIZARD - AV_YH_ECG (049961) ?

1
2
3
4
5

Site Information
Contacts
Roles
Additional Site Information
Summary & Confirm

Site Information

Do you already know the Site ID? Yes No

If you know the Site ID please enter correct one. It has to be unique for this study. i.e. must not already exists (Hint: Enter 4 digits (0-9)).

Site ID *

Timezone of site *

Language(s) spoken at site *

Site Type * Individual Institution

Institution Name *

Do you want to include your site into the Site Data Warehouse? * Yes No

* Required Field(s)

Next

5b. For **Step 2: Contacts**, you fill out sub-steps: 2.1 Contact Information, 2.2 Contact Address, and 2.3 Contact Summary.

Note: *Mandatory fields that must be selected are indicated with a red asterisk (*).*

The first **Contact Information** you enter is the Principal Investigator. **Only** enter the PI information here, including the PI's unique Email. Click **Next** to continue. Proceed through all 3 sub-steps to specify the PI contact information and site address.

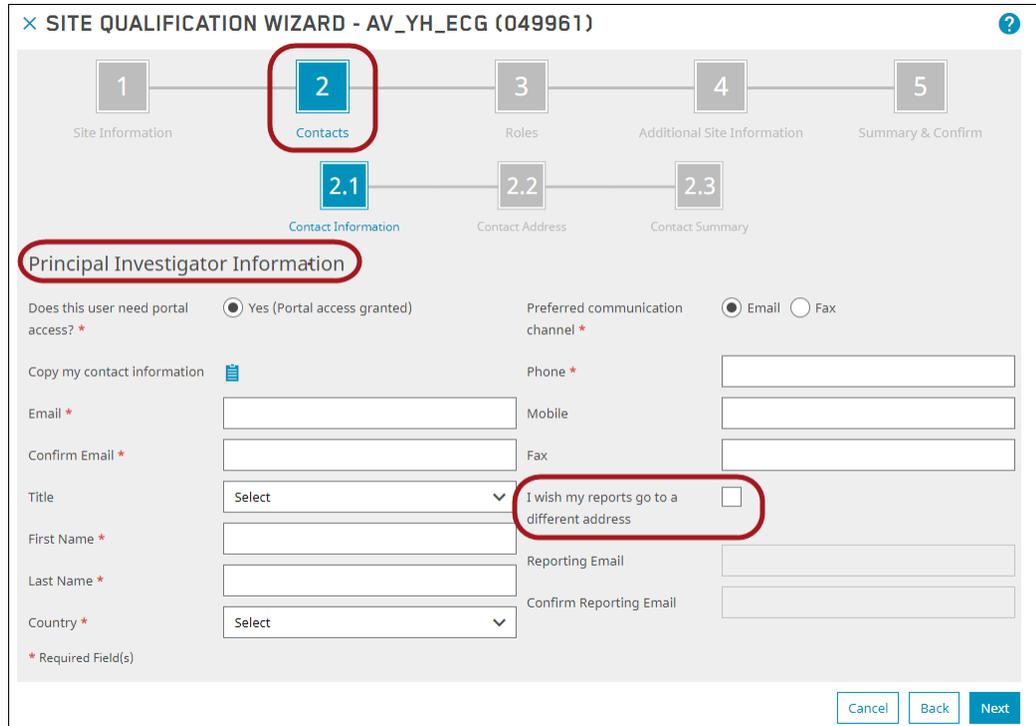
Note: *A different reporting email address from the portal login address can be specified if alerts and reports should be sent to another address. See the checkbox **I wish my reports go to a different address**.*

5c. After you complete step **2.2 Contact Address**, you see step **2.3 Contact Summary**.

Please review before proceeding. If there is incorrect information, click the **Edit** icon  to edit the information.

5d. Continue adding study site users and their contact information by clicking **Add Contact**.

5e. Click **Next** to proceed to the Step 3 of the wizard: **Roles**.



Principal Investigator Information

Does this user need portal access? * Yes (Portal access granted)

Preferred communication channel * Email Fax

Copy my contact information 

Email *

Mobile

Confirm Email *

Fax

Title

I wish my reports go to a different address

First Name *

Reporting Email

Last Name *

Confirm Reporting Email

Country *

* Required Field(s)

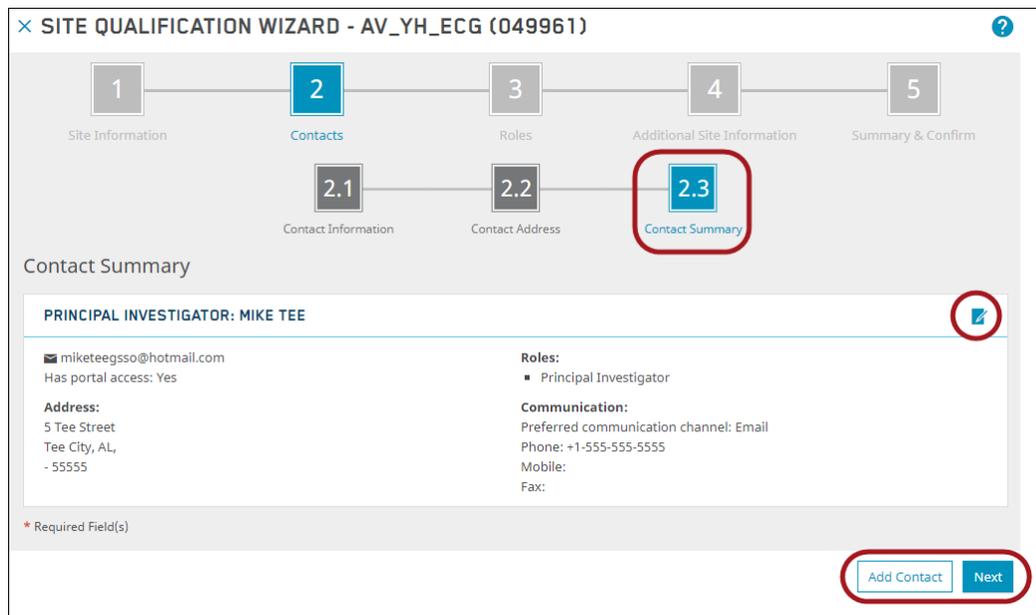
Cancel Back Next



Principal Investigator Address

Address 1 *

Address 2



CONTACT SUMMARY

PRINCIPAL INVESTIGATOR: MIKE TEE 

 miketeegsso@hotmail.com
Has portal access: Yes

Address:
5 Tee Street
Tee City, AL,
- 55555

Roles:
Principal Investigator

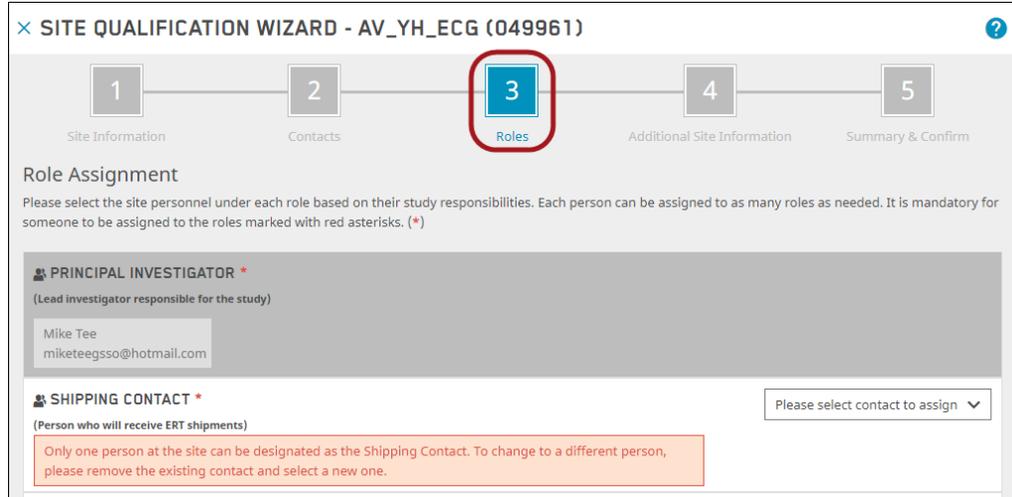
Communication:
Preferred communication channel: Email
Phone: +1-555-555-5555
Mobile:
Fax:

* Required Field(s)

Add Contact Next

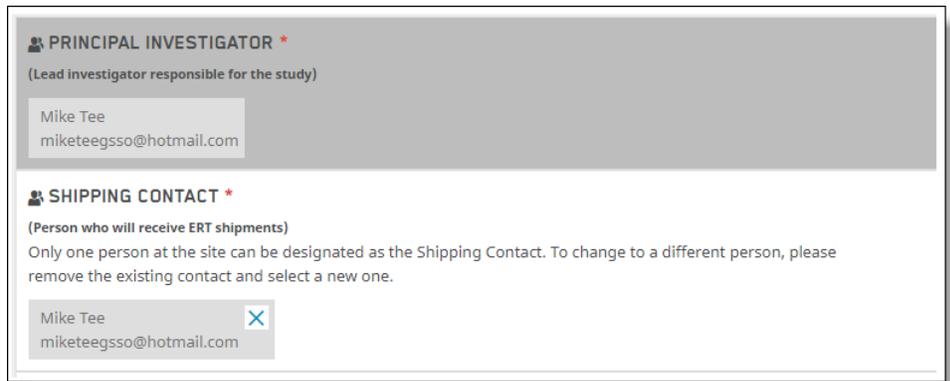
6a. Choose a role or roles for each user by selecting the role from the drop-down list. In the example to the right, the Principal Investigator is being designated as the Shipping Contact, as well.

Note: Each study type has a minimum set of mandatory roles that must be selected. These are marked with an asterisk () to indicate they are roles that must be chosen. The role(s) you select apply to specific access rights in the Portal.*



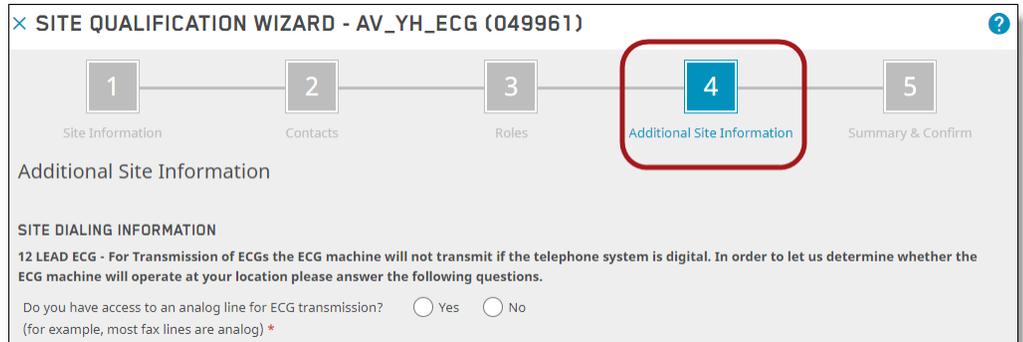
6b. After you complete the role selection process, click the **Next** button to proceed to **Step 4: Additional Site Information**.

Note: The Site Information requested is dependent upon the types of tests/devices your protocol uses.



7a. Select all the necessary site dialing options that apply to your site telephony configuration under this step.

7b. After you complete the Additional Site Information step, click **Next** to proceed to **Step 5: Summary & Confirm**.

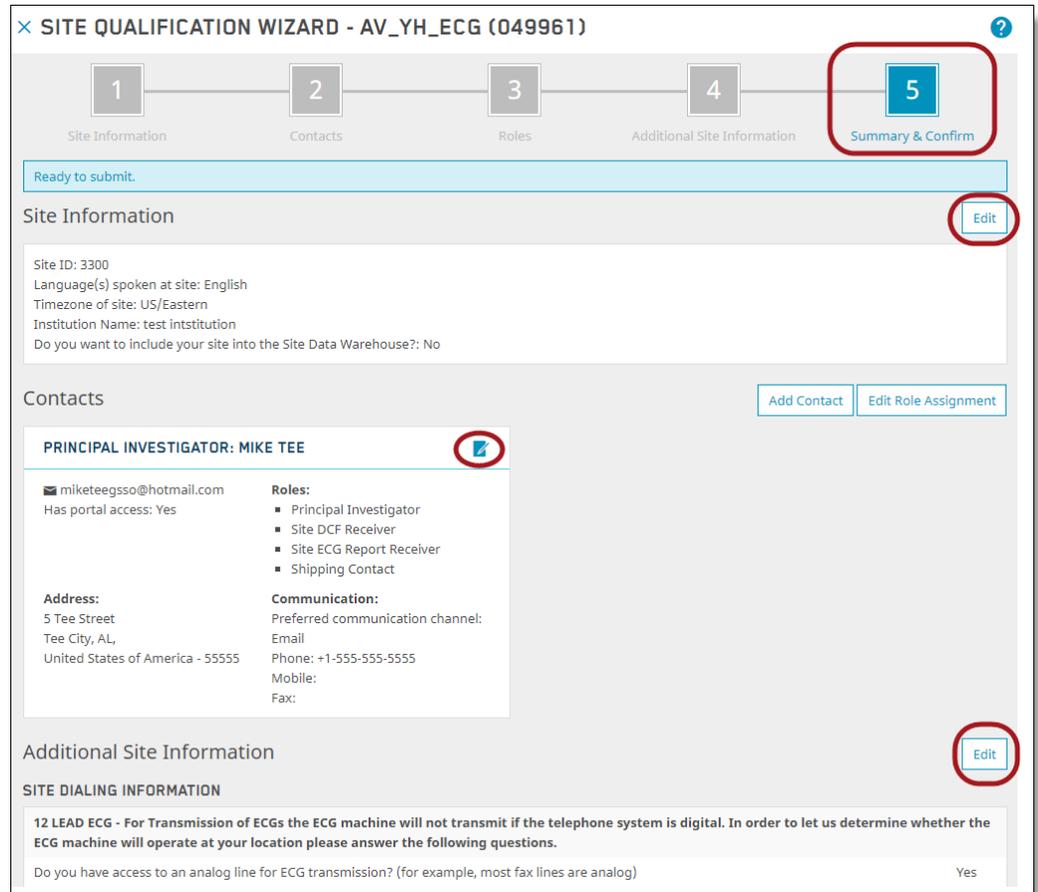


8a. In the **Step 5: Summary & Confirm** step, all previously entered information can be reviewed and edited before submitting the Site Qualification Form.

8b. Click the **Edit** button to edit Site Information and Additional Site Information. You may add contacts and modify role assignments.

8c. To edit specific Contact Information, click the **Edit** icon  next to the contact.

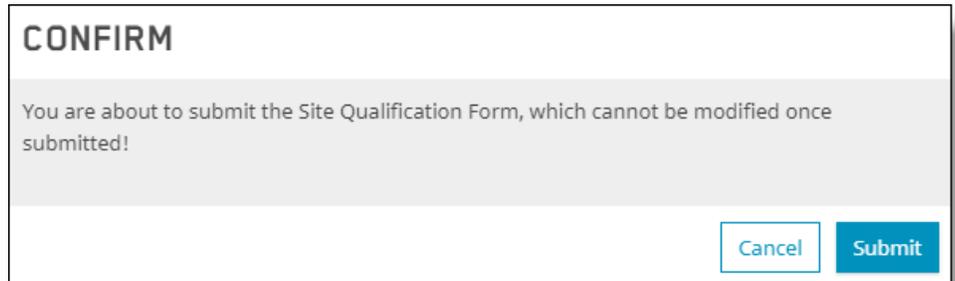
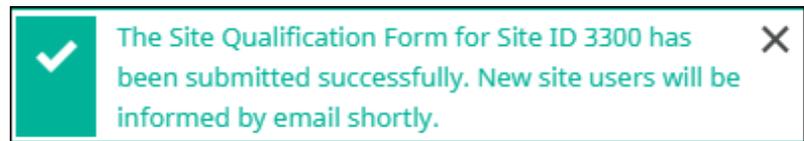
8d. After you make all final edits, click the **Submit SQF** button in the upper right corner of the screen. Optionally, click the **Save & Close** button to review and submit your SQF at a later time.



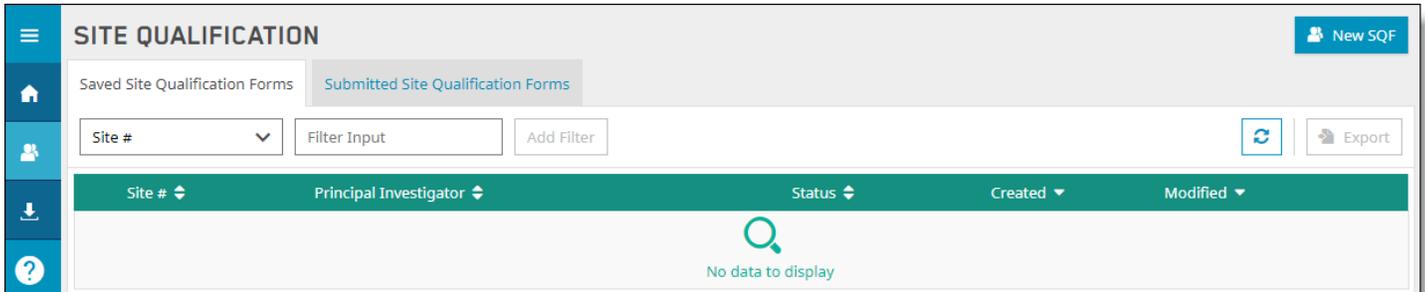
9. Click the **Submit** button in the **Confirm** pop-up window.

10. Another pop-up window displays to advise you that the SQF has been submitted.

11. After you complete the step, check your email for a message titled "Successful Site Qualification Form Submission". All users added to the form should also receive confirmation emails, and should have access to the site within the Portal.

Note: If you already have an ERT Global Account and are submitting an additional SQF for a study you have already joined, click on the **Site Qualification** navigation icon  after logging in and selecting a study, then click the **New SQF** button and repeat steps 5 through 11 of this guide.



The screenshot shows the 'SITE QUALIFICATION' dashboard. At the top right is a 'New SQF' button. Below it are two tabs: 'Saved Site Qualification Forms' and 'Submitted Site Qualification Forms'. A search area includes a 'Site #' dropdown, a 'Filter Input' text box, and an 'Add Filter' button. To the right of the search area are 'Refresh' and 'Export' buttons. Below the search area is a table header with columns: 'Site #', 'Principal Investigator', 'Status', 'Created', and 'Modified'. The table body is empty, displaying a magnifying glass icon and the text 'No data to display'.