

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

1. Navigate to the address: https://gsso.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.

Sert'	Select Study or Organization
Home	
GLOBAL DASHBOARD	
ERT LEARN HELP MAGING	g Started
REGISTER A SITE OR JOIN A NEW STUDY	LINK YOUR PRODUCT ACCOUNTS
Just getting started on a new study? Let's get to work! To register your site for a new study, or join an existing study, click "Register a Site / Join a Study" below.	In order to gain access to your existing studies, you must first link your old product accounts to your new ERT Global Account. To link a product account, click "Link a Product Account" below.
	Linked Accounts Legacy Product
	dward@ert.com My Study Portal 3

The Join a Study window opens.

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

The ERT Global Account > Join a Study				
JOIN A STUDY				
Request Study Access 🕐				
To register yourself or your site for a new study on the ERT Po	To register yourself or your site for a new study on the ERT Portal you need to enter a specific code as described below:			
 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.) To get access to your Imaging study, please contact your study project manager and request access. To get access to the Gather platform, please request an invite from your study or site management. 				
Studies might require registering twice to gain access to all c	Jata types.			
Study Name or Site Qualification PIN: *				
This field is required.				
* Mandatory fields				
📞 Customer Care	Cancel Next			



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

The ERT Global Account 🔸 Join a Study				
JOIN A STUDY				
Request Study Access 🕐				
To register yourself or your site for a new study on the ERT Po	ortal you need to enter a specific code as described below:			
 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.) To get access to your Imaging study, please contact your study project manager and request access. To get access to the Gather platform, please request an invite from your study or site management. Studies might require registering twice to gain access to all data types. 				
Study Name or Site Qualification PIN: *				
* Mandatory fields				
Customer Care Cancel 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.

Are you sure you want to join the study 'AV_YH_ECG'?	
	Cancel Okay

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 onscreen 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.

The ERT Global Account > Join a Study

SITE ADMIN REGISTRATION

Site Admin Registration @

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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.

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)

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?



× SITE QUALIFICAT	ION WIZARD - AV_YH_ECO	G (C)49961)		?
Site Information	Contacts	R	3 Additional	4 5 I Site Information Summary & Confirm	
Site Information					
Do you already know the Site ID? If you know the Site ID please study, i.e. must not already ex	Yes No enter correct one. It has to be unique for t ists (Hint: Enter 4 digits (0-9)).	this	Site Type * Institution Name * Do you want to include your	Individual Institution	
Site ID *			Warehouse? *		
Timezone of site *	Select	~]		
Language(s) spoken at site *]		
* Required Field(s)					
					lext



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 <u>I wish my reports go</u> 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 **Z** 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**.

ERT Quick Guide

Site Information	Contacts	Roles Additional Si	4 5 Summary & Confirm
	2.1	2.2 2.3	
Principal Investigat	or Information		ппету
Does this user need portal access? *	• Yes (Portal access granted)	Preferred communication channel *	• Email · Fax
Copy my contact information	₿	Phone *	
Email *		Mobile	
Confirm Email *		Fax	
Title	Select	V I wish my reports go to a	
First Name *		different address	
Last Name *		Reporting Email	
Country *	Select	Confirm Reporting Email	
* Required Field(s)			
			Cancei Back
Pr Ada	incipal Investigator A dress 1 * 5 dress 2	ddress Tee Street	
× SITE QUALIFICAT	ION WIZARD - AV_YH_E	:CG (049961)	
× SITE QUALIFICAT	FION WIZARD - AV_YH_E	CG (049961)	2 Information Summary & Confirm
× SITE QUALIFICAT	FION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information	CG (049961) 3 4 Roles Additional Site 2.2 2 Contact Address Contact Sum	2 Information Summary & Confirm
× SITE QUALIFICAT	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information	ECG (049961) Roles Additional Site 2.2 Contact Address Contact Sum	2 Information Summary & Confirm
× SITE QUALIFICAT	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information	ECG (049961) Roles Additional Site 2.2 Contact Address Contact Sum	2 Information Summary & Confirm
× SITE QUALIFICAT	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information OR: MIKE TEE	ECG (049961) 3 Roles Contact Address Contact Address Roles: • Principal Investinator	2 Information Summary & Confirm
× SITE QUALIFICAT	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information OR: MIKE TEE	ECG (049961) Roles Additional Site 2.2 Contact Address Contact Sumu Roles: • Principal Investigator Communication:	e Information Summary & Confirm
 SITE QUALIFICAT Site Information Contact Summary PRINCIPAL INVESTIGAT miketeegsso@hotmail.co Has portal access: Yes Address: 5 Tee Street Tee City, AL, - 55555 	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information OR: MIKE TEE	ECG (049961) Roles Additional Site 2.2 2.3 Contact Address Contact Sum Roles: • Principal Investigator Communication Preferred communication chann Phone: +1-555-5555 Mobile: Fax:	e Information Summary & Confirm
 SITE QUALIFICAT Site Information Site Information Contact Summary PRINCIPAL INVESTIGAT miketeegsso@hotmail.cc Has portal access: Yes Address: S Tee Street Tee City, AL, S5555 * Required Field(s) 	TION WIZARD - AV_YH_I 2 Contacts 2.1 Contact Information OR: MIKE TEE	ECG (049961) Roles Additional Site 2.2 Contact Address Contact Sum Roles: • Principal Investigator Communication Phone: +1-555-5555 Mobile: Fax:	e: Email

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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**.

ERT Quick Guide

Contacts Contact Conta	SITE QUALIFICATIO)N WIZARD - AV_Y	H_ECG (043301)			
ease select the site personnel under each role based on their study responsibilities. Each person can be assigned to as many roles as needed. It is mandato memoene to be assigned to the roles marked with red asterisks. (*) PRINCIPAL INVESTIGATOR * (tead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com PRINCIPAL INVESTIGATOR * (tead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com SHIPPING CONTACT * (tead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com SHIPPING CONTACT * (tead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com SHIPPING CONTACT * (respon who will receive ERT shipments) Only one person at the site can be designated as the Shipping Contact. To change to a different person, please remove the existing contact and select a new one.	Site Information	Contacts	3 Roles	Additional Site	Information	5 Summary & Confirm
Clear Assignment Clear Assignment Clear assigned to the roles marked with red asterisks. (*) PRINCIPAL INVESTIGATOR * (Lead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com Please select contact to assign SHIPPING CONTACT * Please select a new one. Please select contact to assign SHIPPING CONTACT * (Lead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com SHIPPING CONTACT * (Lead investigator responsible for the study) Mike Tee miketeegsso@hotmail.com SHIPPING CONTACT * (Person who will receive ERT shipments) Only one person at the site can be designated as the Shipping Contact. To change to a different person, please remove the existing contact and select a new one.	ole Assignment					
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miketeegsso@hotmail.com



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 **Z** 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.

× SITE QUALIFICATION	WIZARD - AV_YH_EC	G (049961)		?
1 Site Information	2	- 3	Additional Site Information	5 Summary & Confirm
Ready to submit.				
Site Information				Edit
Site ID: 3300 Language(s) spoken at site: English Timezone of site: US/Eastern Institution Name: test intstitution Do you want to include your site into) the Site Data Warehouse?: No			
Contacts			Add Con	tact Edit Role Assignment
PRINCIPAL INVESTIGATOR: MI	ке тее			
ĭ miketeegsso@hotmail.com Has portal access: Yes	Roles: Principal Investigator Site DCF Receiver Site ECG Report Receiver Shipping Contact			
Address: 5 Tee Street Tee City, AL, United States of America - 55555	Communication: Preferred communication channe Email Phone: +1-555-555-5555 Mobile: Fax:	21:		
Additional Site Information	on			Edit
12 LEAD ECG - For Transmission of ECG machine will operate at your	ECGs the ECG machine will not trai	nsmit if the telephone	system is digital. In order to let	us determine whether the
Do you have access to an apples line	for ECG transmission? (for every	most fax lines are and	log)	Vor



The Site Qualification Form for Site ID 3300 has been submitted successfully. New site users will be informed by email shortly.



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.

=	SITE QUALIFICATIO	N			🛔 New SQF
ń	Saved Site Qualification Forms	Submitted Site Qualification Forms			
2	Site #	Filter Input Add Filter			2 Export
	Site # 🖨	Principal Investigator 🗢	Status ≑	Created 🔻	Modified 🔻
<u> </u>			0		
?			No data to display		