

SAMPLE QRG/JOB AID FOR TECH PROCESS

Training Coordinators & Trainees

Patient Support Program

Central Repository Quick Reference Guide

Introduction

This **Quick Reference Guide** is designed to give you step-by-step instructions with system screenshots and highlights for all functionality of the new system to assist you in completing and/or managing your training. Please refer to the Table of Contents below to find a specific topic.

Program Goals

The intent of the Patient Support Program Central Repository is to compile information about PSP activities being performed on behalf of the company to ensure appropriate oversight and processes are in place.

The company has established Standard Operating Procedures (SOPs) which govern the way we conduct our business through our business partners. The company appreciates your support of this process.

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PSP Central Repository Registration Information

To enroll in the system, the Patient Support Program Owner will add you as a Vendor Training Coordinator and the Vendor Training Coordinator will have the ability to add Trainee(s) and request a registration email. Upon completion of this step, you will receive an email from the specific company department. Click the link in the email to go to the Registration page.

Note: Your first and last name, email address, and User ID will be pre-populated. All fields except for the phone number are mandatory.

A screenshot of a web-based registration form titled "Registration". The form is set against a dark background with a city skyline. It contains several input fields: "First Name" (pre-filled with "John"), "Last Name" (pre-filled with "Doe"), "Email Address" (pre-filled with "j@doe.com"), "Phone" (empty), "User ID" (pre-filled with "JDoe", highlighted with a purple box and callout A), "Password" (empty, highlighted with a purple box and callout B), "Confirm Password" (empty), "Security Question" (pre-filled with "What is my Birth Place?", highlighted with a purple box and callout C), and "Security Answer" (empty). A green "Submit" button is at the bottom left, highlighted with a purple box and callout D. Below the form, a password requirement note is visible: "Password must contain minimum 8 characters and maximum 15 characters and minimum One Alphabet and One Number and may following special characters: !@#\$%^&*(){}~.-+;:'\"/>

Registration

First Name: John

Last Name: Doe

Email Address: j@doe.com

Phone:

User ID: JDoe

Password:

Confirm Password:

Security Question: What is my Birth Place?

Security Answer:

Submit

Password must contain minimum 8 characters and maximum 15 characters and minimum One Alphabet and One Number and may following special characters: !@#\$%^&*(){}~.-+;:'"

1. Complete the form.

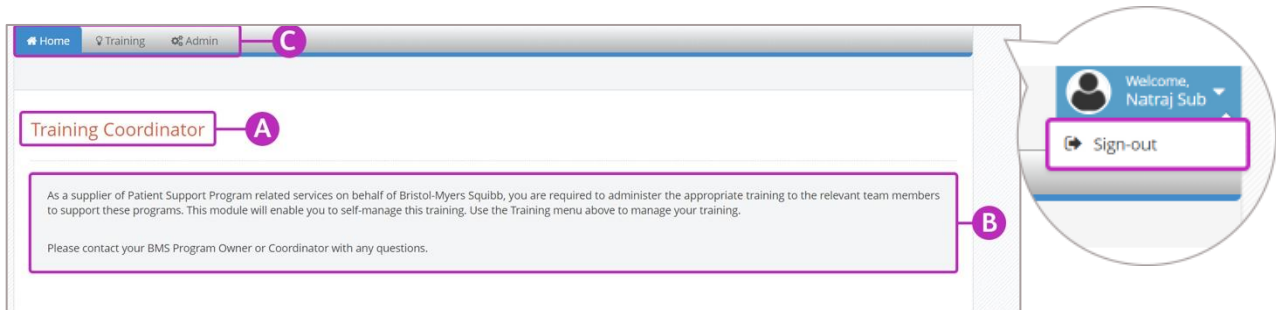
Notes:

- A) **User ID:** Make a note of your user ID as you will need it to enter the portal, along with your password.
- B) **Password:** Note the instructions at the bottom of the page when creating your password.
- C) **Security Question Answer:** Make this your birthplace. If you forget your password, you will need your birthplace to receive/reset a new password.
- D) Click the **Submit** button when you have completed the form. This will take you to the system homepage.

Training Coordinators

Homepage Information & Navigation

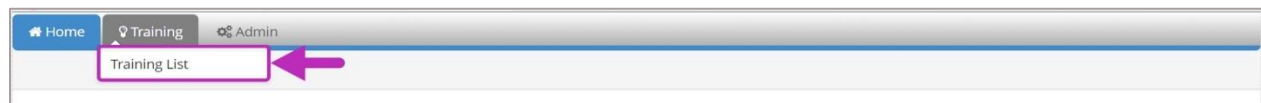
When you log into the system, you will be taken to the homepage. Here you will find:



- A) Your role
- B) Information about your responsibilities in the portal
- C) Menu tabs - click to navigate to those specific pages
- D) You will also find your username in the top-right corner. Click it to sign out.

Training Tab Navigation

This is the tab you will use most frequently in the system.



1. Hover over the **Training Tab** in the top menu.
2. Then select **Training List** from the drop-down.

Training Coordinators (Continued)

Training List Page - Basic Navigation

This page shows all your training in a list format.

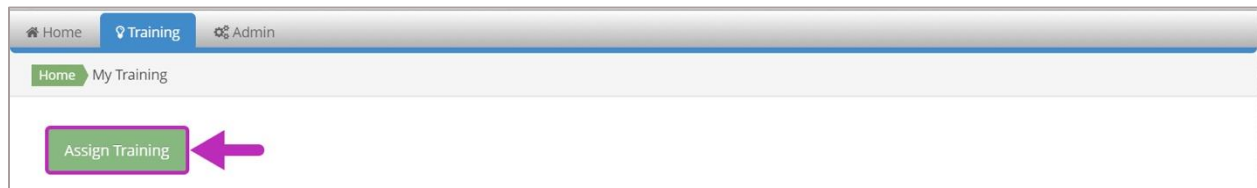
The screenshot shows the 'My Training' page. At the top, there are navigation links: Home, Training (selected), and Admin. Below this is a breadcrumb trail: Home > My Training. A green button labeled 'Assign Training' is circled in purple and labeled 'A'. Below this is a section titled 'My Training & Quiz' circled in purple and labeled 'B'. It contains two date filters: 'Created Date' and 'Completed Date', each with 'From' and 'To' date pickers. A green 'Go' button is to the right. Below the filters is a table with columns: User Name, Vendor Name, Type, Name, Due Date, Completed Date, Status, and Action. The first row of the table is highlighted with a purple box and labeled 'C'. The table contains several rows of training records. The status of each record is shown in a colored box (orange for 'In Progress', green for 'Completed') and is labeled 'E'. The 'View' button in the 'Action' column is circled in purple and labeled 'F'. At the bottom of the table, there is an 'Excel' icon circled in purple and labeled 'G'. The page footer shows 'Page 1 of 1', a search bar with '30', and 'View 1 - 16 of 16'.

User Name	Vendor Name	Type	Name	Due Date	Completed Date	Status	Action
Che Rag	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	02/22/2020		In Progress	
Rajita Nair	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	03/05/2020	02/04/2020	Completed	View
Sarathi Trainee	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	03/19/2020		In Progress	
Natraj Sub	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	02/21/2020	03/12/2020	Completed	View
Rajita Nair	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	03/19/2020	02/20/2020	Completed	View
Natraj Sub	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	03/20/2020	03/13/2020	Completed	View
fanny schultz	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	04/12/2020	03/20/2020	In Progress	

- A) Assign training by clicking this button. (Topic covered later in guide.)
- B) My Training & Quiz section - Filtering options (Enter dates and click Go.)
- C) Search/Filter fields
- D) Main training list
- E) Status of training
- F) **View** or **Continue** training by clicking buttons
- G) Export list to Excel by clicking icon at bottom of page

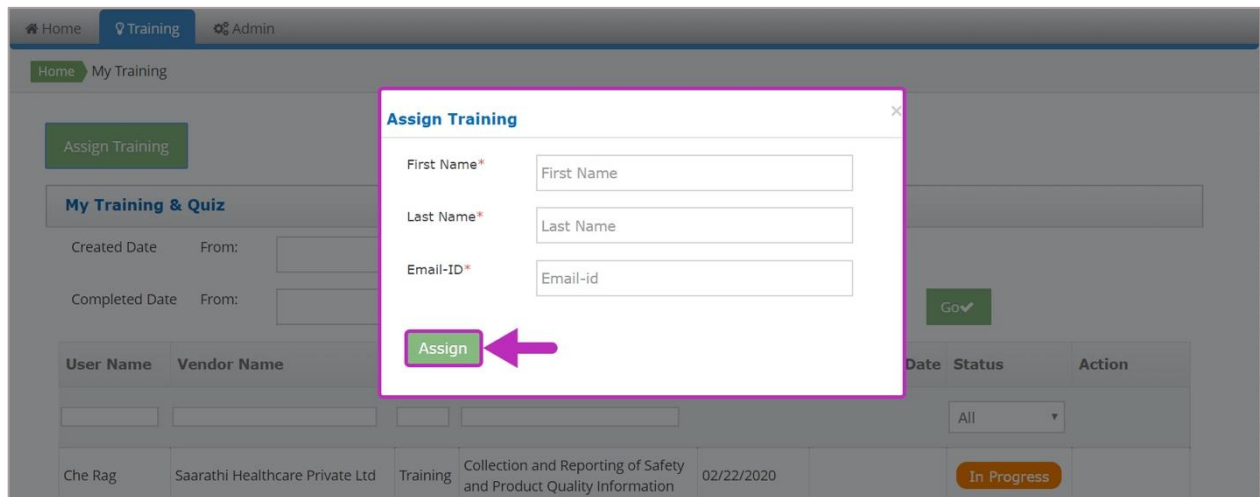
Training Coordinators (Continued)

Assigning Training



1. On main page, click **Assign Training**.

2. Complete the information on the pop-up form.



Note: All information is required.

3. Click **Assign**.

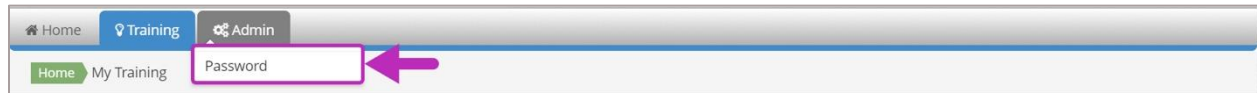


4. You will receive a confirmation pop-up that the training was added successfully.

Training Coordinators (Continued)

Admin Tab

Use this tab and follow these steps to change your system password.



1. Hover over **Admin Tab**.
2. Click **Password**.

Changing Your Password

A screenshot of the 'Change Password' form. The form is titled 'Change Password' and contains four input fields: 'User ID' (with the value 'NSub'), 'Old Password' (with masked characters '*****'), 'New Password', and 'Confirm New Password'. The 'New Password' and 'Confirm New Password' fields are highlighted with purple boxes. To the right of each of these two fields is a red asterisk and a question mark icon. Below the input fields is a blue 'Submit' button with a checkmark icon.

1. Fill in your new password.
2. Confirm your new password.

A close-up screenshot of the 'New Password' and 'Confirm New Password' input fields. The 'New Password' field is highlighted with a purple box, and a purple arrow points to the question mark icon next to it. The 'Confirm New Password' field is also highlighted with a purple box.

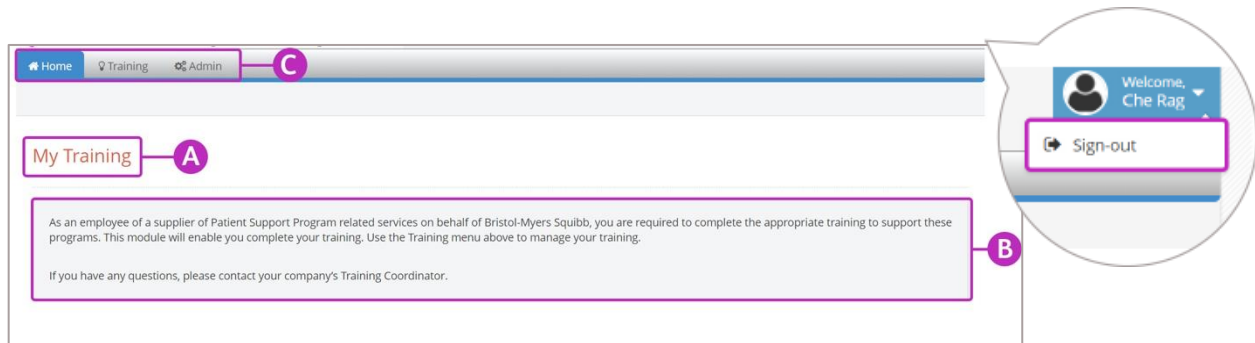
Note: Hover over the question mark icon for tips on creating a strong password. For example, it must contain a minimum of eight characters with one letter of the alphabet and one numeral, as well as a special character.

3. Click **Submit**.

Trainees

Homepage Information & Navigation

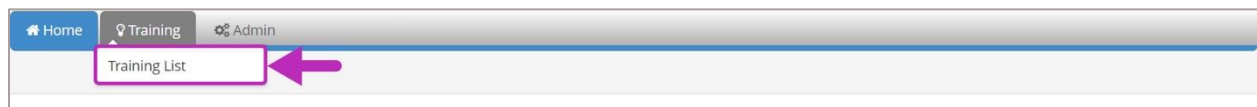
When you log into the system, you will be taken to the homepage. Here you will find:



- A) Your role
- B) General information about your training and the system
- C) Menu tabs - click to navigate to those specific pages
- D) You will also find your username in the top-right corner. Click it to sign out.

Training Tab Navigation

Use this tab to access your training and information about it.



1. Hover over the **Training Tab** in the top menu.
2. Then select **Training List** from the drop-down.

Trainees (Continued)

Training List Page - Basic Navigation

The screenshot shows the 'My Training & Quiz' section of the application. It includes a search filter with 'Created Date' and 'Completed Date' ranges, a 'Go' button, and a table of training modules. Annotations A, B, C, and D point to specific features: A points to the search filter, B points to the search input fields, C points to a training row, and D points to the 'Excel' export icon. Arrows also point to the 'In Progress' status and the 'Continue' button in the 'Action' column.

User Name	Vendor Name	Type	Name	Due Date	Completed Date	Status	Action
Che Rag	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	02/22/2020		In Progress	Continue

- A) My Training & Quiz section - Filtering options to search for training (Enter dates and click **Go**.)
- B) Search/Filter fields - blank fields
- C) Your assigned training
(Note the information listed in each column as shown by the arrows: Name of training, Due Date, Completed Date, Status and Action.)
- D) Export to Excel by clicking this icon

Trainees (Continued)

Managing Your Training

User Name	Vendor Name	Type	Name	Due Date	Completed Date	Status	Action
						All	
Che Rag	Saarathi Healthcare Private Ltd	Training	Collection and Reporting of Safety and Product Quality Information	02/22/2020		In Progress	Continue

1. Click the button in the **Action** column to either **View** a new training or **Continue** viewing a training module.

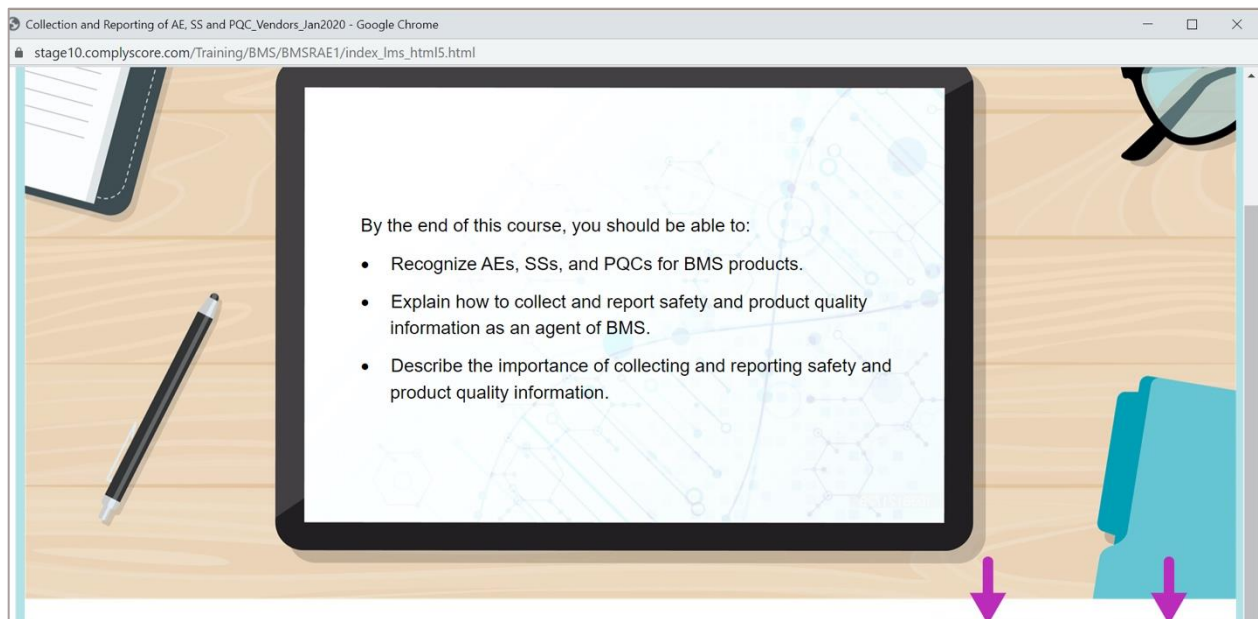
Resume

Would you like to resume where you left off?

Yes No

Note: If you are continuing training, a pop-up will open asking if you wish to resume where you left off. If you are beginning a training, the module will launch when you click **View**.

Sample Training Module

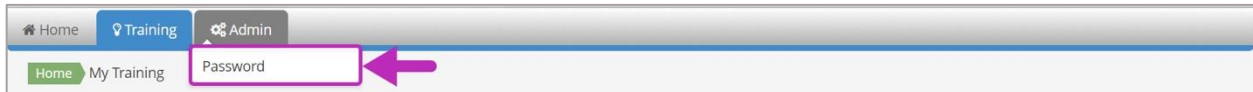


Note: To navigate through your training, click **Prev** to go back a screen, or **Next** to move forward. Please note: these buttons will be visible in the actual UI.

Trainees (Continued)

Admin Tab

Use this tab and follow the steps to change your system password.



2. Hover over **Admin Tab**.
3. Click **Password**.

Changing Your Password

A screenshot of the 'Change Password' form. The form is titled 'Change Password' in blue text. It contains four input fields: 'User ID' with the value 'CRag', 'Old Password' with masked characters '.....', 'New Password' (highlighted with a purple box), and 'Confirm New Password' (also highlighted with a purple box). Each input field has a red asterisk icon to its right. Below the input fields is a blue 'Submit' button with a checkmark icon.

1. Fill in your new password.
2. Confirm your new password.

A close-up screenshot of the 'New Password' and 'Confirm New Password' input fields. Both fields are empty and have a red asterisk icon to their right. A purple box highlights the question mark icon next to the 'New Password' field, and a purple arrow points to it from the right.

Note: Hover over the question-mark icon for tips on creating a strong password. For example, it must contain a minimum of eight characters with one letter of the alphabet and one numeral, as well as a special character.

3. Click **Submit**.