Table of Contents

For a detailed description on each activity explained in this Job Aid, refer to the [SIP Site User Online Help](#).

SIP Help Desk Email: SIPHelp@Cognizant.com | Telephone: *See* Help Desk

Legal Notice

Revision History

Version	Date	Author	Changes
1.1.0.21	25 April 2022	Cognizant Technology Solutions	Release 7.1 Updates
1.1.0.22	01 Aug 2022	Cognizant Technology Solutions	Release 8.0 Updates

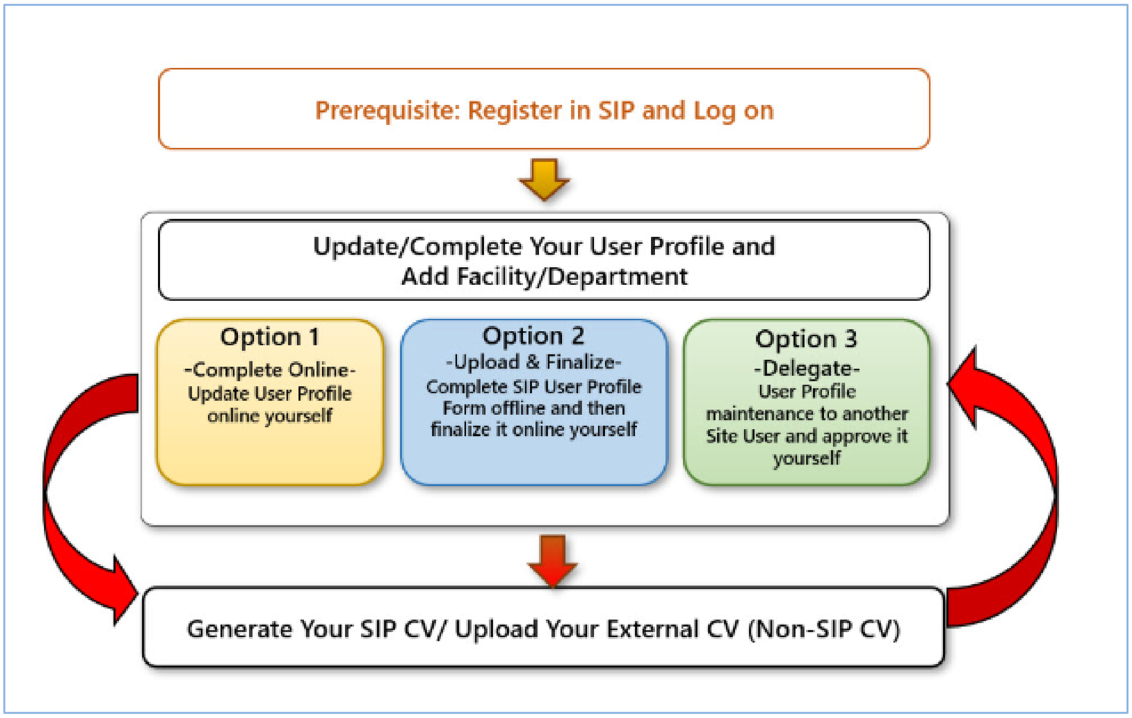
1 What is a User Profile and how is it used?

Your User Profile documents your affiliations, qualifications, research experiences, and Good Clinical Practice (GCP) training and can be used to generate your Curriculum Vitae (CV). Completing your User Profile makes your information searchable for all Sponsors running clinical trials in SIP. After registering in SIP, you must first complete your User Profile and generate your SIP Curriculum Vitae (CV).

2 How can I update my User Profile?

There are three options for updating your User Profile:

- Update User Profile Online**:** Enter the information directly in SIP on the User Profile >> **My Profile** page. To navigate from any section of the User Profile to the next section, click <**Section Name>** >. Alternatively, on the User Profile navigation pane on the left, click the relevant section name. For more information, refer to the User Profile Navigation Pane.
- Delegate: Assign your User Profile to another Site User (known as the Delegate) or to an Organization that is affiliated with your Facility/Department, who completes it on your behalf. You are required to review and approve the updates made by the Delegate or the Organization.
- Upload SIP User Profile Form: If you prefer to complete a form offline and then upload data into SIP, you can utilize the SIP User Profile Form. There are limitations to using the form, such as the form does not allow the user to add multiple records for certain sections and no attachments are possible via the form.



3 User Profile Menu

The User Profile menu in SIP consists of the following:

- **My Profile** – Update your User Profile and generate your CV.
- **Delegated Profiles** – Update User Profiles delegated to you by other Site Users.
- **Approve/Reject Update(s)** – Approve or reject updates made by the Delegates or Organization to your User Profile.

4 How can I update my User Profile directly in SIP and generate my SIP CV?

A Principal Investigator or Sub-Investigator should register as Investigator and all other roles as Clinical Research User. To navigate to the **My Profile** page, on the menu bar, click **User Profile** > **My Profile**. Depending on whether your role in SIP is **Investigator** or **Clinical Research User**, you are required to complete specific sections of the User Profile in order to generate your SIP CV. Each completed section is marked by a green checkmark. Incomplete sections are marked as half grey shaded circles. You can see the Last Modified Date for the User Profile on the My Profile page. For more information on User Profile sections, refer to the SIP Site User Online Help.

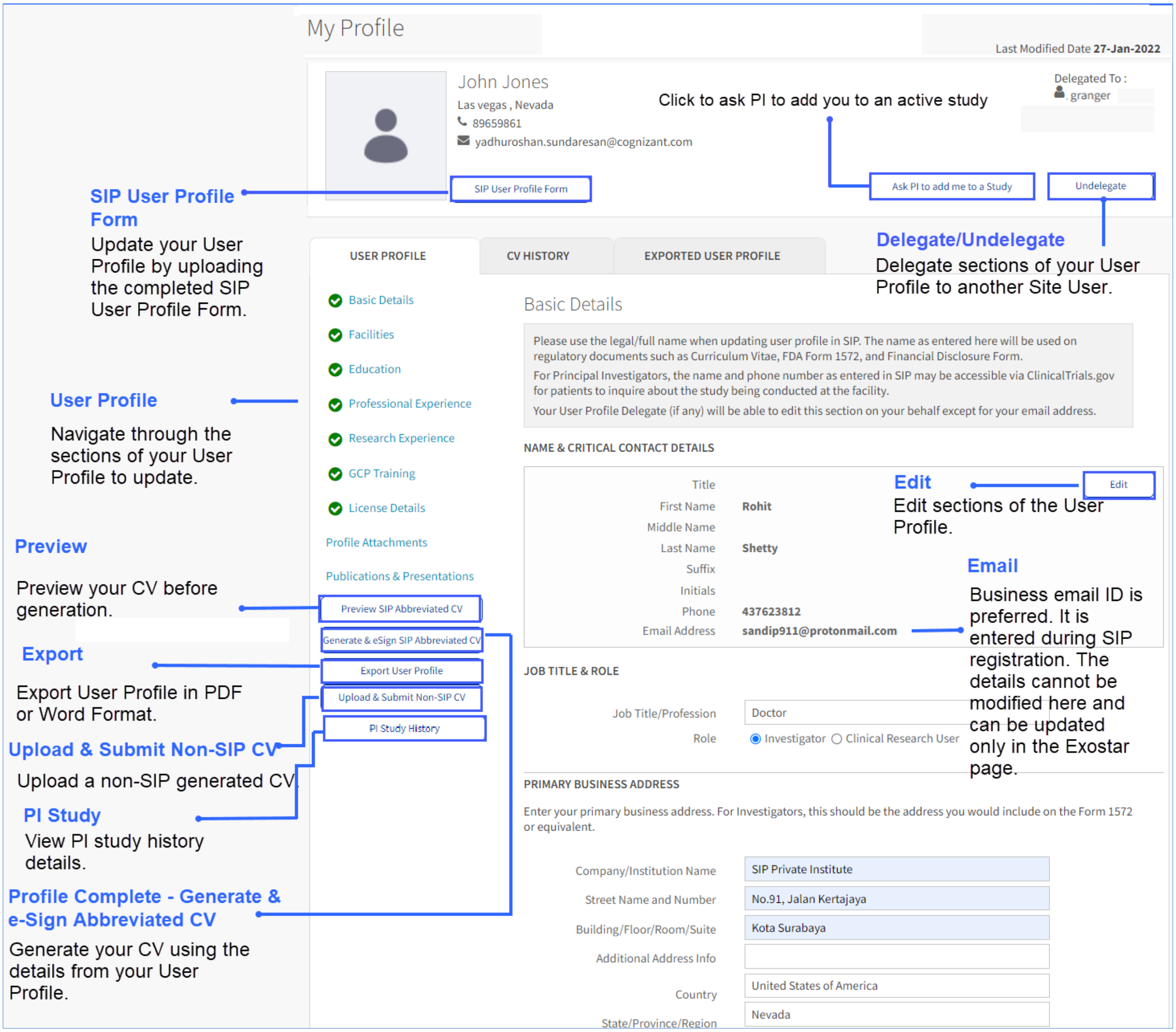
5 What are the important features of the My Profile page?

The **My Profile** page allows Site Users to view, maintain, and share information such as their name, phone number, email address, training, experience, and research area of interest with Sponsors. For more information, refer to the My Profile section.

The **My Profile** page has the following tabs:

- **User Profile**—Update the various sections of your User Profile and generate your CV.
- **CV History**—View all versions of your CV that you have generated and the access records of your CV by Sponsor Users to date.
- **Exported User Profile**—View exported User Profile.

6 My Profile Page



6.1 Update User Profile Option 1: Complete Online (Navigation and Important Features)

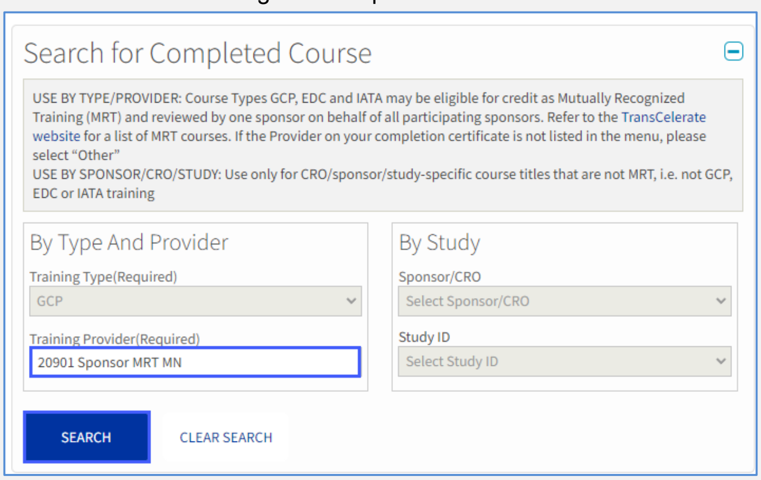
To navigate to the **My Profile** page, on the menu bar, click **User Profile** > **My Profile**.

After you update each section of the User Profile, you can navigate to the next section by clicking <**Section Name>**. Navigating to other sections by clicking the **Next Section Name**> or <**Previous Section Name** buttons, will also save the User Profile details. Alternatively, on the **User Profile** navigation pane, click the relevant section name. The User Profile details will also be saved when you navigate to other sections from the left navigation pane.

You can also save your changes at any point of time by clicking **Save**. In the following table, Sections and Fields specified as **required** for your Role are needed to generate your CV. Optional fields provide Sponsors with additional information, but are not required for the CV. You can mark sections or fields as **Not Applicable** if warranted, based on their relevance to your role. The Security questions (also called Challenge questions) allow you to secure your User ID and password. You can update these questions and answers.

Section	Description	Investigator	Clinical Research User
Profile Picture	Upload your recent picture in JPG, GIF, PNG, or BMP format. Maximum permissible dimensions are 100 x 110 pixels.	Optional	Optional
Basic Details	**Name and Critical Contact Details** View your basic personal details, including the details that you had entered during registration. Basic details include: • Title or prefix of your name. For example: Mr., Ms., Prof, and Dr. • First Name • Middle Name • Last Name • Suffix: For example: Senior, Junior, I, and II. • Initials • Mobile/Cell Phone (This number may be made publicly available on regulatory authority portal) • Email address (Users can update email in SIP by clicking on the Edit icon present right next to the email address present at top right of the page .) **Job Title & Role** • Job Title/Profession—The Job Title or Profession at the Facility (or Facilities) you are associated with. • Role—Your role at the Facility (or Facilities) you are associated with. You cannot select multiple roles. The available options include: ○ Investigator ○ Clinical Research User – This is a non-Investigator role in SIP. If you select Clinical Research User, an additional drop-down list is displayed, where you can select the type of role within the Clinical Research User category. The list includes the following roles: ▪ Budget/Financial Contact ▪ Laboratory Contact ▪ Legal Contact ▪ National Coordinating Investigator ▪ Nurse ▪ Other ▪ Pharmacist ▪ Pharmacy staff ▪ Recruitment/Retention Contact ▪ Regulatory Contact ▪ Safety Contact ▪ Site Administrator ▪ Site Data Manager ▪ Study Coordinator ▪ If the type of role is not listed, select **Other**. **Primary Business Address** For Investigators, this is the address you include on FDA Form 1572 or equivalent: • Company or Institution Name	Required	Required

	• Primary Business Address Details **Other Contact Details** • Additional Contact Numbers—Enter your main/daytime, evening, and 24-hour phone numbers, fax number, and pager number. Information • National Provider ID (NPI) – A unique 10-digit number is provided to every licensed practitioner in the US.		
Facilities	Adding your Facility and/or Department to your User Profile is critical for all users. • Potential Investigators must be added to a Facility before they can accept a Sponsor's Study invitation. • Clinical Research Users must be added to Facilities and/or Departments in order to be added to a Study. • Facilities must be added for receiving the site feasibility surveys. **To add a Facility or Department:** • Click **Add Facility**. • Search for your Facility/Department by entering the relevant details such as Country name and/or other details such as Facility Name or SIP Facility ID. SIP will return all Facilities, along with Departments under the Facilities. • If your Facility/Department exists, select and add it to your User Profile. • If your Facility/Department does not exist, you can create it. Refer to the Facility Profile Job Aid for details.	Required	Required
Education	Enter your academic degrees and professional certifications. If there are no records, select the **Not Applicable** check box. If the **Specialty** does not display the specialty, you wish to add, you may update the value under the **Degree** field in parenthesis. For example, MD (General Practitioner).	Required	Optional
Professional Experience	Provide your relevant positions including academic appointments. If there are no records, select the **Not Applicable** check box. • **Job Title** —Enter the job title. • **Institution/Department**—Type the name of the institution or department where you worked or were trained. • **Year Started**—Type the year in which the specialization or training was started. • **Current Position**—Select the check box if you are still at this position. The Year Completed field will not be available if you select this option. • **Year Completed**—Type the year in which the specialization or training was completed.	Required	Optional
Research Experience **If you do not want to record your clinical study Research Experience details, select the Not Applicable checkbox.**			
	Study Type - Select the relevant Study types. If you select **Other**, in the box displayed, type the details of the Study.	Required	Required
	Clinical Study Phases - Select the Clinical Study phases for the trials you have conducted. You can select multiple Clinical Study phases.	Required	Required
	Therapeutic Area(s) of Expertise - Add the Therapeutic areas in which you have Research Expertise.	Required	Required

	In the Sub-therapeutic area drop-down list, select the Sub-therapeutic area of research expertise that you want to add. You can select multiple Sub Therapeutic areas.		
	Total Clinical Research Experience Complete one line for each of the Therapeutic Areas for the trials you have conducted: • **Therapeutic Area—**Identify and select the Therapeutic Area(s) in which you have expertise. • **Sub Therapeutic Area**—Select the sub-therapeutic areas in which you have expertise. • **Number of Completed Studies**—Type the number of clinical studies that you have completed for the selected therapeutic and sub-therapeutic area(s). • **Number of Ongoing Studies**—Type the number of ongoing clinical studies for the selected therapeutic and sub-therapeutic area. On-going clinical studies are defined clinical studies that you are currently working on.	Required	Required
GCP Training	All Site Users can enter their Good Clinical Practice (GCP) training however, this section is not required for all roles. To submit your completed GCP training for Sponsor review: • Click **Yes** for **Have you completed GCP Training?** And then click **Submit Training Credit Request**. For details to request and submit training request, refer to the **Manage Training Job Aid**. GCP training that is on the TransCelerate GCP list is referred to as Mutually Recognized GCP Training (MRT). You can view the list of courses on the following website: http://www.transceleratebiopharmainc.com/gcp-training-attestation/ To submit a GCP training credit request:  • On the **Search for Completed Course** page, select the **Training Type** as GCP and then select the **Training Provider** for your course. Click **Search**. • From the search results, select the **Course Title** that most closely matches your GCP course name. If you did not select the correct **Training Provider**, click the plus (+) icon to search for the course again. • Selecting the **Course Not Listed** button will mark the training as Non MRT. It should be used only for courses or providers that are not found on the above website.	Required	Optional

	If you are updating a User Profile that has been delegated to you by another Site User: • You can submit a GCP Training Credit Request on behalf of the User Profile Owner; however, you cannot access the training details of this user. • Also, you can only submit a credit request for a GCP course completed by the User Profile Owner. You cannot select a different course type. • To view the User Profile Owner's Training Certificates, click the PDF icon for each certificate. ❖ *If you are raising a GCP Training Credit Request through the **User Profile** menu, you can cancel the request for training credit at any step of submission.* ❖ *To cancel the training credit request, click **Cancel**. You will be navigated to the **GCP Training** page.*		
License Details	If you do not want to record your research experience details, select the **Not Applicable** check box. This section is used to capture any medical licenses that demonstrate your qualifications for your role on the Study. To add a license or certificate, click **Add License**. Enter the following for each License: • Type of License • License Issuer • Issue Date • Country • State/Province/Region The following fields are Optional and users can select them as Not Applicable, if necessary, while adding the License details: • Professional License Number • Expiration Date • Supporting Document You can upload new versions of the Medical License document when updating the existing license details. Only the last updated document version is displayed here. You can continue to upload an expired license by clicking **Upload License** in the Expired License pop-up that is displayed. You can also remove expired licenses by clicking the **Remove** icon, next to the relevant license.	Required	Optional
Profile Attachments	Click **Upload New Document** to attach documents supporting Site and Staff research qualifications. Select the type of document in **Document Type**. The following options are available for document types: certifications, degree certificates, License to Handle Controlled Substances, Radio-Label Handling License, and Joint Rater License. Users can select the document type as **Other** when they are not sure about the document category type. The previously uploaded document types are displayed here.	Optional	Optional
Publications & Presentations	Record relevant publications and presentations associated with your research. Journal and abstracts should be updated in the Publications table and Presentations in the Presentations table.	Optional	Optional

6.2 Update User Profile Option 2: Upload SIP User Profile Form

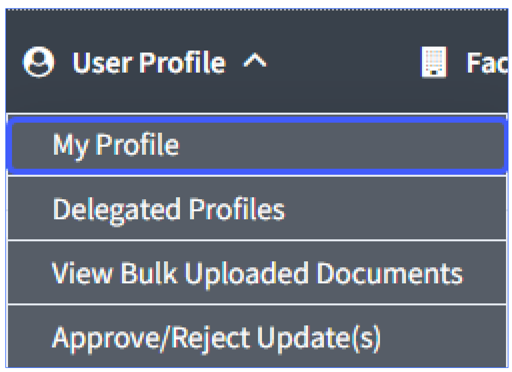
If you prefer to complete a form offline and then upload data into SIP, you can utilize the SIP User Profile Form and upload the completed form on the My Profile page.

Limitations of SIP User Profile Form

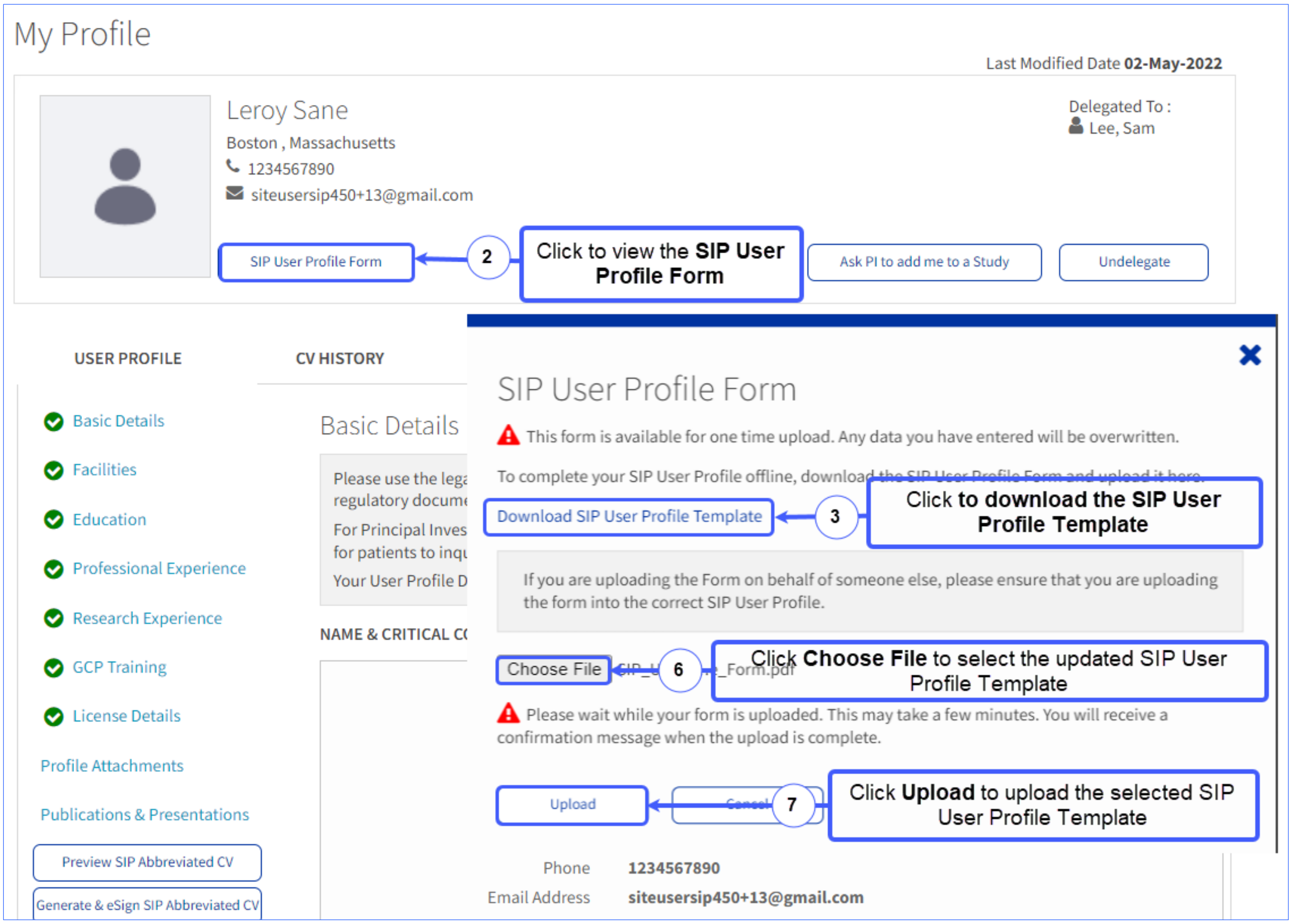
- *The form does not allow the user to add multiple records for certain sections.*
- *No attachments are possible via form.*
- *After SIP imports the details to the User Profile from the SIP User Profile Form, you need to verify and update the details on the My Profile page, as required.*
- *Automated CV upload feature is available in SIP. Site User can send the CV in any format and request the SIP Helpdesk to automate the CV upload in SIP User Profile format.*
- *When the User navigates to My Profile, the CV Automation Request pop-up is displayed.*
- *Download the SIP User Profile Form by using the Click Here to download the Form.*
- *If all records in the File are correct, click **Accept**.*
- *Alternatively, users can update the details in the form and share it with SIP Helpdesk.*

To upload the completed SIP User Profile Form

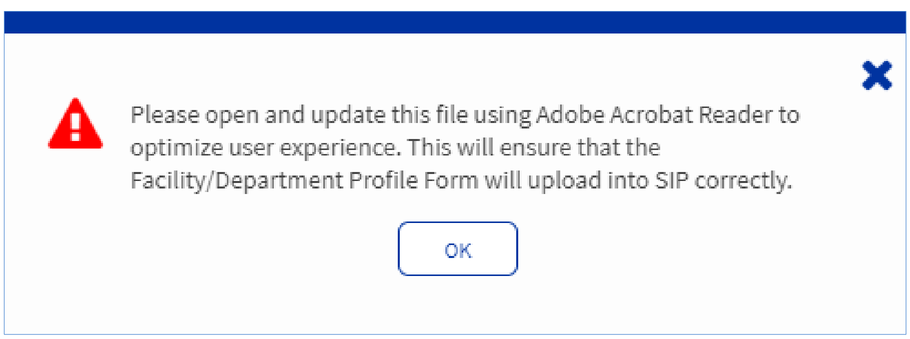
1. On the **User Profile** menu, click **My Profile**.



2. Click **SIP User Profile Form**.
3. On the **SIP User Profile Form** dialog box, click **Download SIP User Profile Template**.

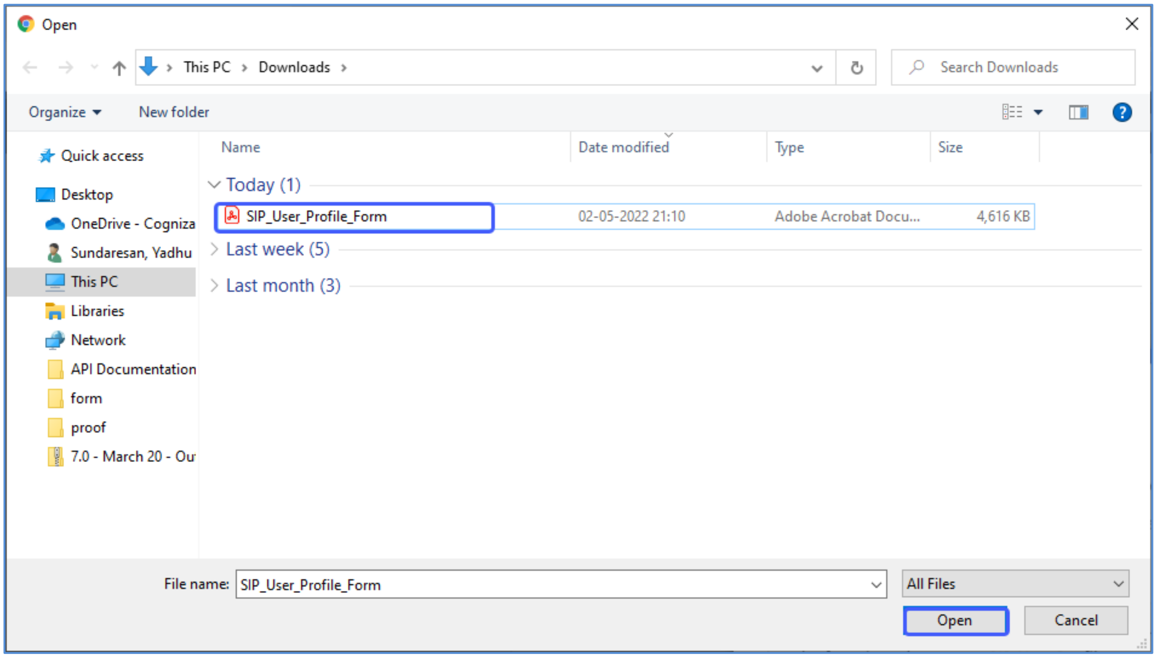


All SIP Forms require Adobe Reader for an optimal user experience.



- *Click **Ok**.*

4. Type/Select the required details in the SIP User Profile Form.
5. Click **Save** after modifying the form details.
6. Click **Choose File** to upload the SIP User Profile Form, on the **SIP User Profile Form** dialog box.



7. Click **Upload Document** to upload the SIP User Profile Form.

6.3 Update User Profile Option 3: Delegation

The **Delegate** feature allows you to delegate the completion of your User Profile to another Site User or an Organization.

A Delegate is a Site User or an Organization to whom another Site User (Delegator) assigns the task of updating the User Profile.

Your User Profile Delegate can perform the following updates to your User Profile:

- Delegates can modify all the information in the Basic Details section except your email address information
- Delegates can update the Basic Details section in the User Profile Form
- Delegates can mark a facility as the primary facility on your behalf
- Delegates can select the facilities on your behalf that are to be displayed in the CV.

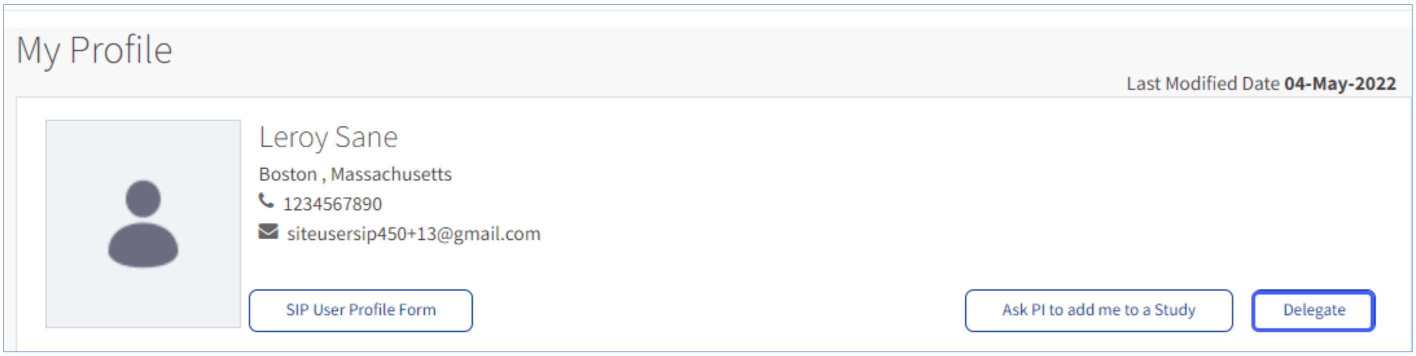
Delegates can complete all the sections in the **My Profile** page for a delegated user profile and send the changes back to the User Profile Owner for approval.

This depends on the User Profile Approval flag setting chosen by the user profile owner. Refer to Step 3: Configuring User Profile Approval Settings (User Profile Owner) section for more information.

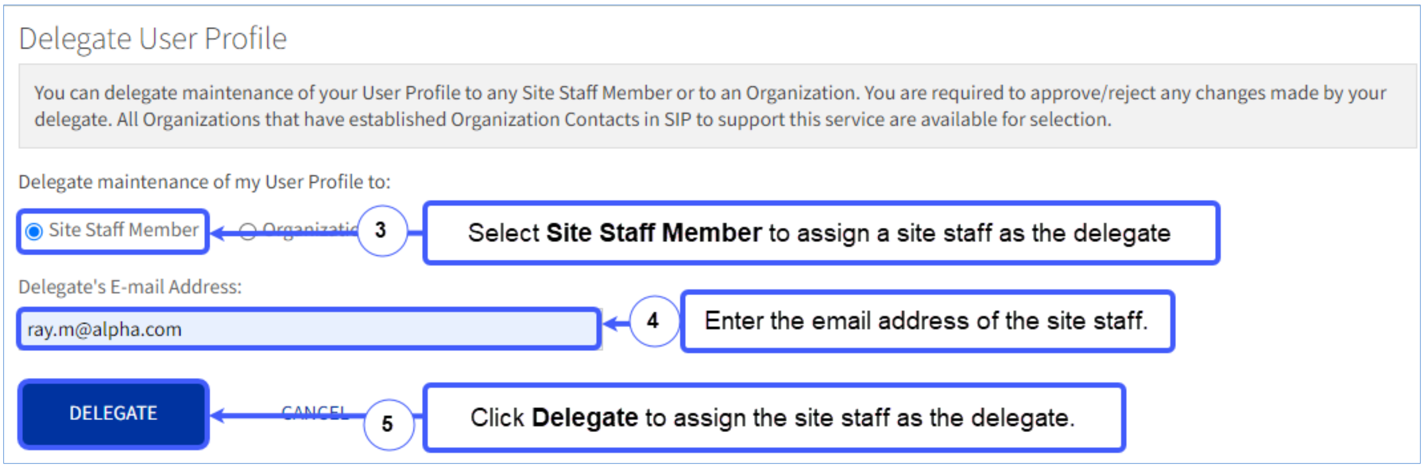
If you select an Organization as the Delegate, then the Organization will assign an Organization Contact who will update your User Profile.

6.3.1 Step 1: Assign a Delegate

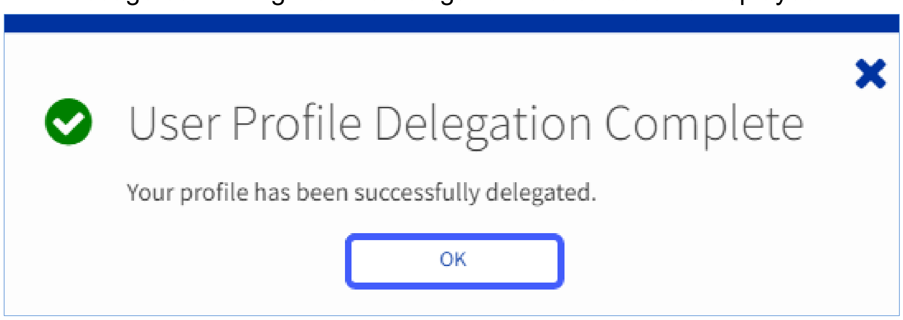
1. On the **My Profile** page, click **Delegate**.



2. The **Delegate User Profile** section is displayed.



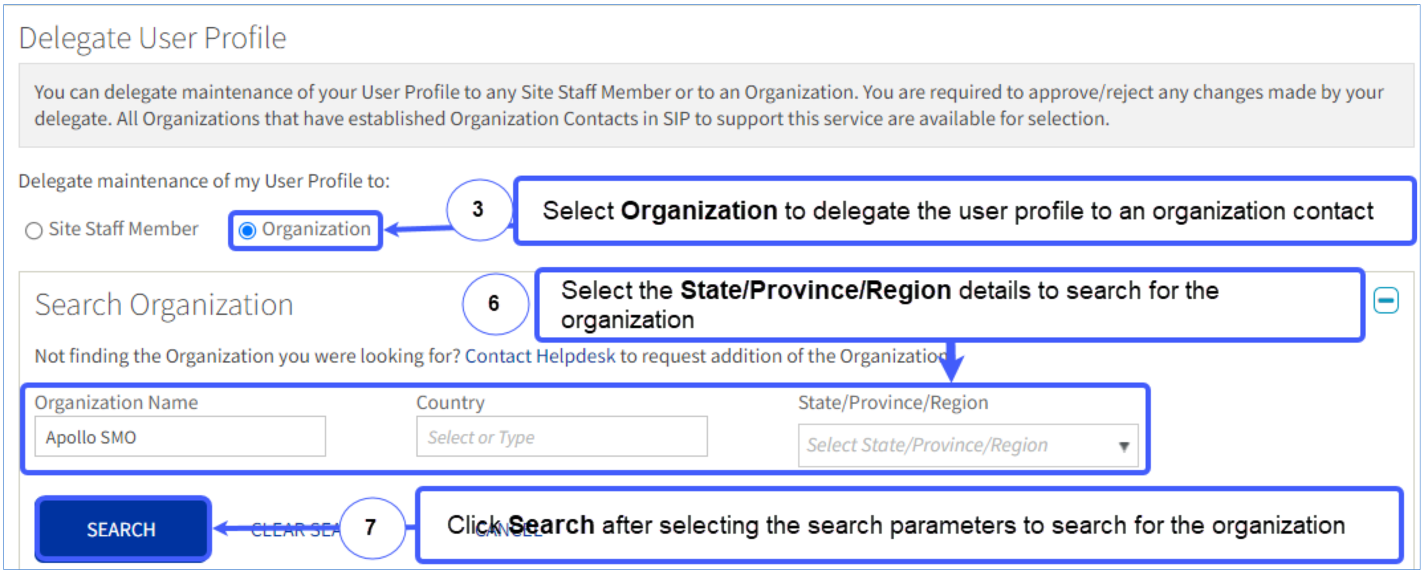
3. In the **Delegate User Profile** section, select **Site Staff Member** or **Organization.**
4. For **Site Staff Member**, enter the delegate's email address in the box.
5. Click **Delegate**. A message confirming that the delegation is successful is displayed.



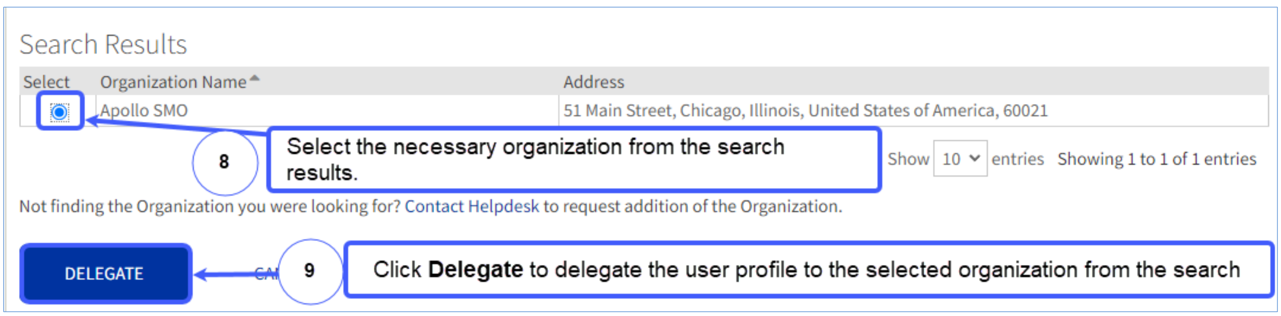
*The name of the delegate will be displayed on the **My Profile** page.*

OR
For Organization, follow the steps provided below before completing Step 3.

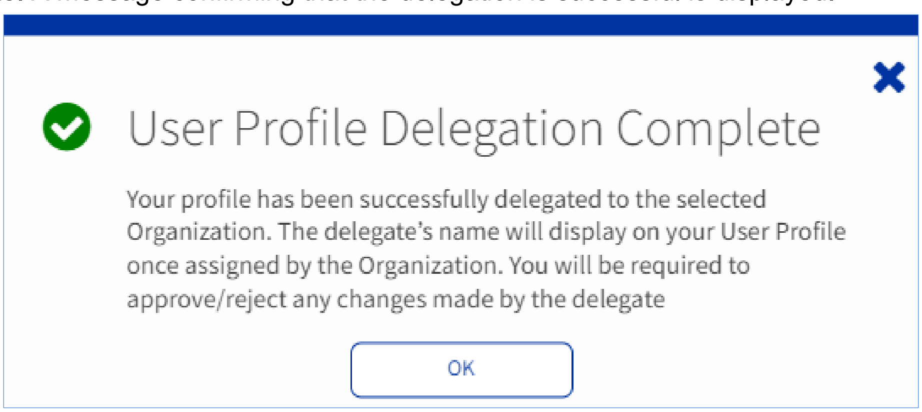
6. In the **Search Organization** section, select the **Organization Name** and/or **Country** as the search criteria.
7. Click **Search**. The list of Organizations affiliated with your Facility/Department who have at least one User Profile contact and are providing the user profile updating service are displayed.



8. In the **Search Results** section, select the Organization that you want to assign as a delegate to update your user profile.



9. Click **Delegate**. A message confirming that the delegation is successful is displayed.



- *If the Delegate is not registered in SIP, the **Not a Registered SIP User** dialog box is displayed. To send an email containing a registration invite to the delegate, click **Send Registration Invite**.*
- *If you need to change the Delegate, in the **Delegate** dialog box, click next to the **Delegate To** field.*

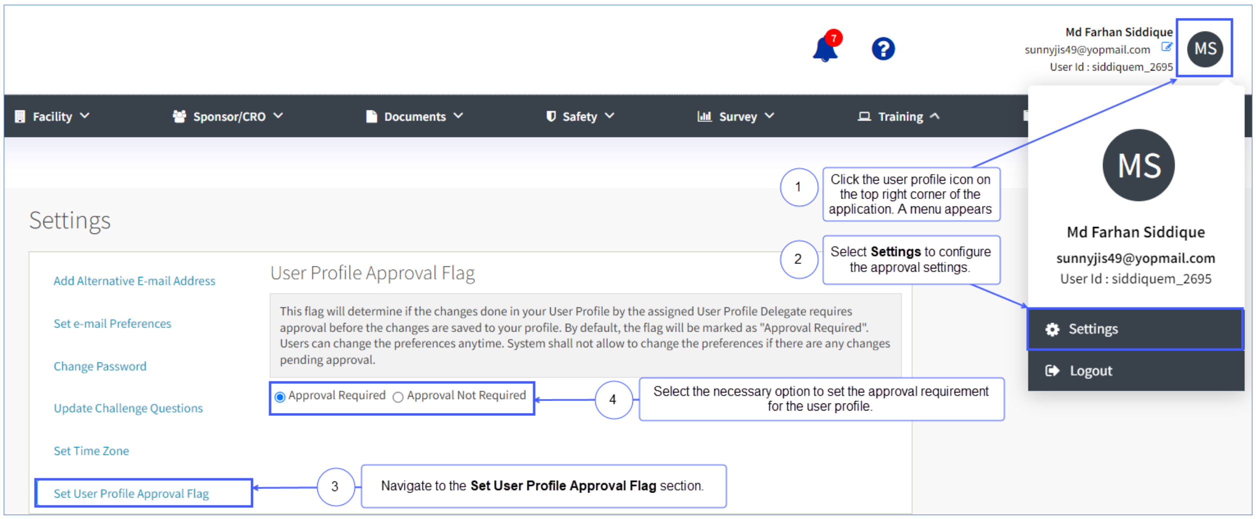
- *To revoke the delegation authority of a Delegate for your User Profile, on the **My Profile** page, click **Undelegate**. On the **Undelegate Profile** dialog box click **Yes**. Click **OK**. You can click **Delegate** to delegate the User Profile to another Site User again. If you delegate your profile after undelegating, any changes that you have not approved will appear in your User Profile.*

6.3.2 Step 2: Configuring User Profile Approval Settings (User Profile Owner)

The User Profile Owner can select the following options to configure approval or rejection of the profile updates by a Delegate to their User Profile page.

To Configure User Profile Approval Settings

1. Click the MS icon on the top right corner of the application. A menu appears.
2. Select **Settings**. The **Settings** page appears.
3. Navigate to the **Set User Profile Approval Flag** section.



The Profile Owner can select the following options to approve or reject the profile updates by a Delegate:

- **Approval Required** - User Profile Owner reviews the updates made by the Delegate before approval.
- **Approval Not Required** - All changes made by Delegate to the User Profile are automatically approved.

Refer to User Profile Delegation section in the [Central Delegation Job Aid] for detailed information on configuring, approving or rejecting delegate changes for a user profile.

6.3.3 Step 3: Approve or Reject User Profile Updates (User Profile Owner)

To approve or reject Delegate updates to a User Profile:

1. On the **User Profile** menu, click **Approve/Reject Update(s)**.

- *You can identify the sections that are updated with the icon next to it.*
- *A detailed description of the process of updating each section of your User Profile is documented in the **SIP Site User Online Help: Manage User Profile**.*

2. Navigate through the sections of the User Profile that were updated by the Delegate and review the updates. For each section with an update by the Delegate, you can click **Approve This Change** or **Reject This Change** to approve or reject the change respectively.
3. To approve the updates, in the **User Profile** navigation pane, click **Approve All Changes**, and then click **OK.**

- *To reject the updates, in the **User Profile** navigation pane, click **Reject All Changes**.*
- *You will be unable to remove the current delegation of your User Profile unless you Approve or Reject the updates.*

7 Facility Details

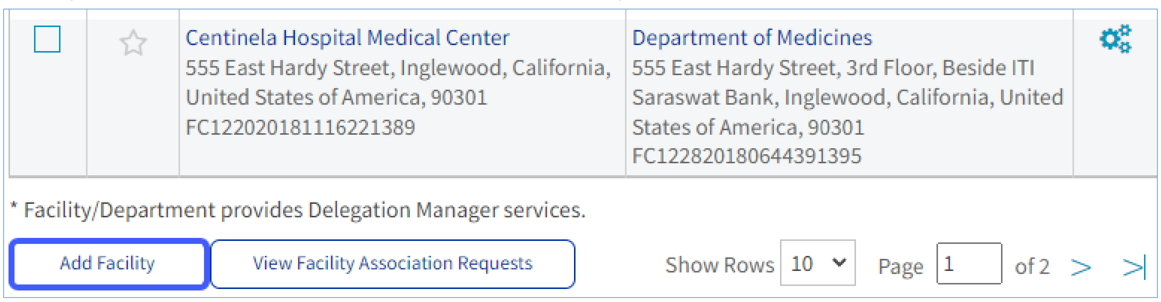
My Profile - Facilities section allows you to add a Facility and/or Department to your User Profile. Adding a Facility/Department is mandatory for the following:

- Accepting Study selection invitations from Sponsor Users.
- Allowing Principal Investigator(s) at Facilities and/or Departments to add you as Study Site Staff for Studies conducted at those Facilities/Departments.

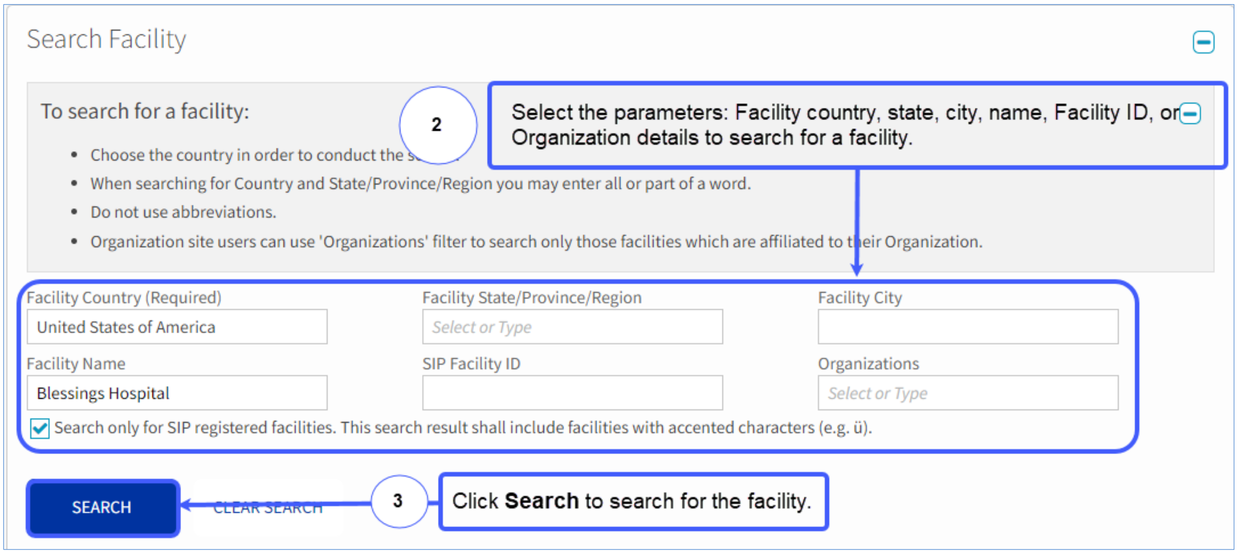
The availability of a Delegation Manager for a facility or department is indicated by an asterisk on the affiliated facility or department in the **My Facilities** screen.

Add a Facility to your User Profile

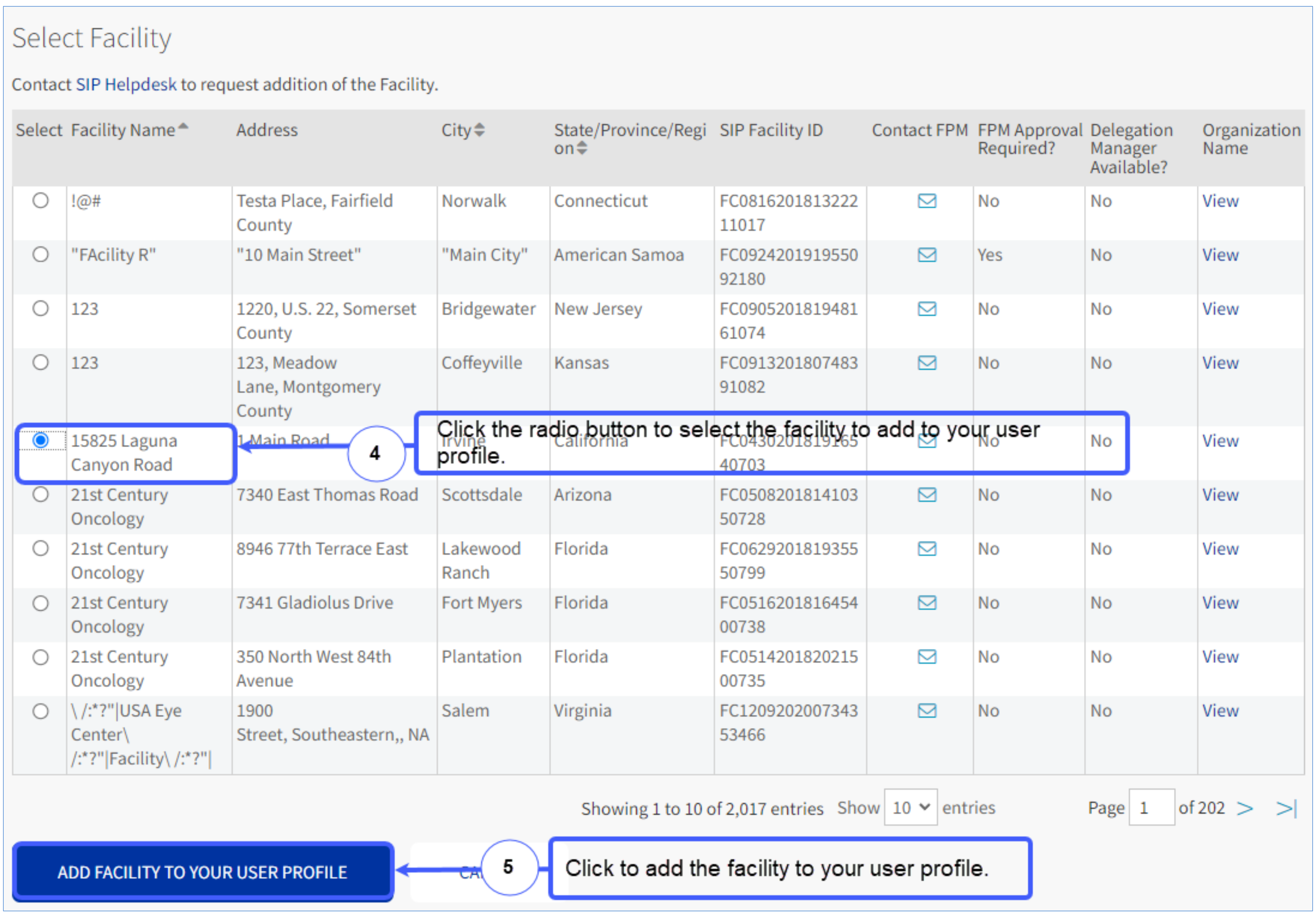
1. On the **My Profile—Facilities** section, click **Add Facility**.



2. In the **Search Facility** page, enter any or all of the search criteria.
3. Click **Search**.



4. From the **Select Facility** table, click the name of the facility you want to add to your User Profile.



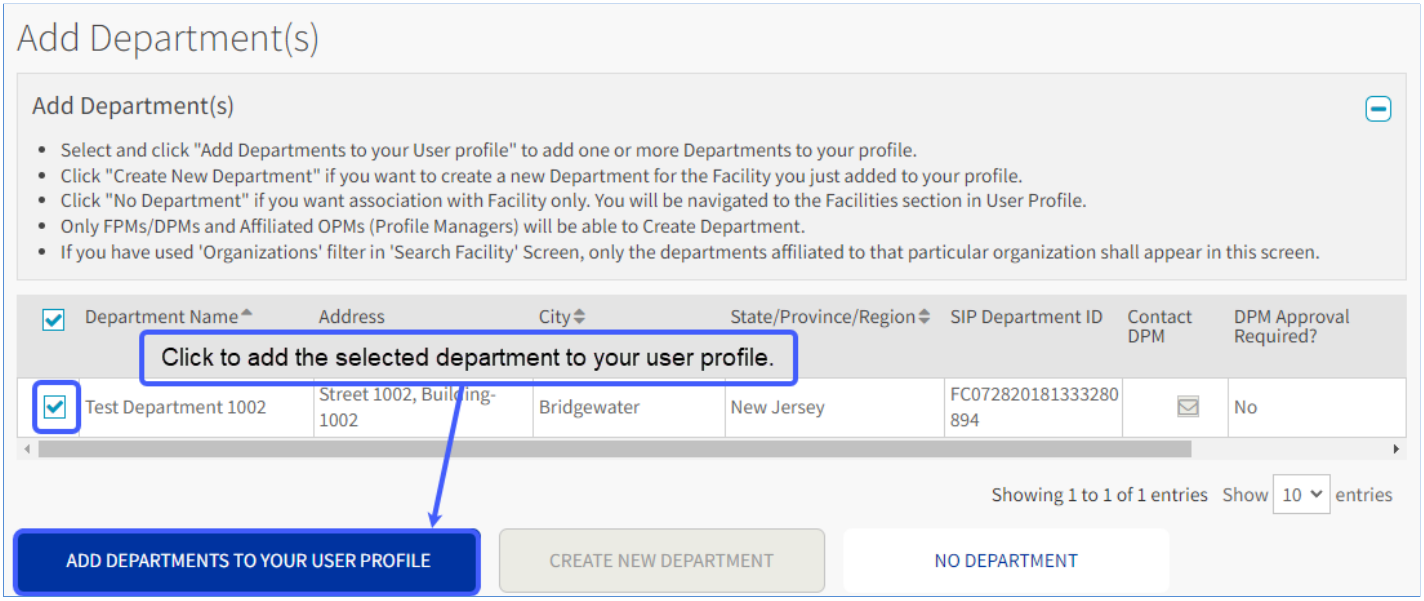
Select	Facility Name	Address	City	State/Province/Region	SIP Facility ID	Contact FPM	FPM Approval Required?	Delegation Manager Available?	Organization Name
○	!@#	Testa Place, Fairfield County	Norwalk	Connecticut	FC081620181322211017	✉	No	No	View
○	"FAcility R"	"10 Main Street"	"Main City"	American Samoa	FC092420191955092180	✉	Yes	No	View
○	123	1220, U.S. 22, Somerset County	Bridgewater	New Jersey	FC090520181948161074	✉	No	No	View
○	123	123, Meadow Lane, Montgomery County	Coffeyville	Kansas	FC091320180748391082	✉	No	No	View
◉	15825 Laguna Canyon Road	1 Main Road	Irvine	California	FC043020181916540703	✉	No	No	View
○	21st Century Oncology	7340 East Thomas Road	Scottsdale	Arizona	FC050820181410350728	✉	No	No	View
○	21st Century Oncology	8946 77th Terrace East	Lakewood Ranch	Florida	FC062920181935550799	✉	No	No	View
○	21st Century Oncology	7341 Gladiolus Drive	Fort Myers	Florida	FC051620181645400738	✉	No	No	View
○	21st Century Oncology	350 North West 84th Avenue	Plantation	Florida	FC051420182021500735	✉	No	No	View
○	\ /:*?"|USA Eye Center\ /:*?"|Facility\ /:*?"|	1900 Street, Southeastern,, NA	Salem	Virginia	FC120920200734353466	✉	No	No	View

5. Click **Add Facility to Your User Profile**.

For a detailed description on each activity explained in this Job Aid, refer to the SIP Site User Online Help.

SIP Help Desk Email: SIPHelp@Cognizant.com | Telephone: *See* Help Desk

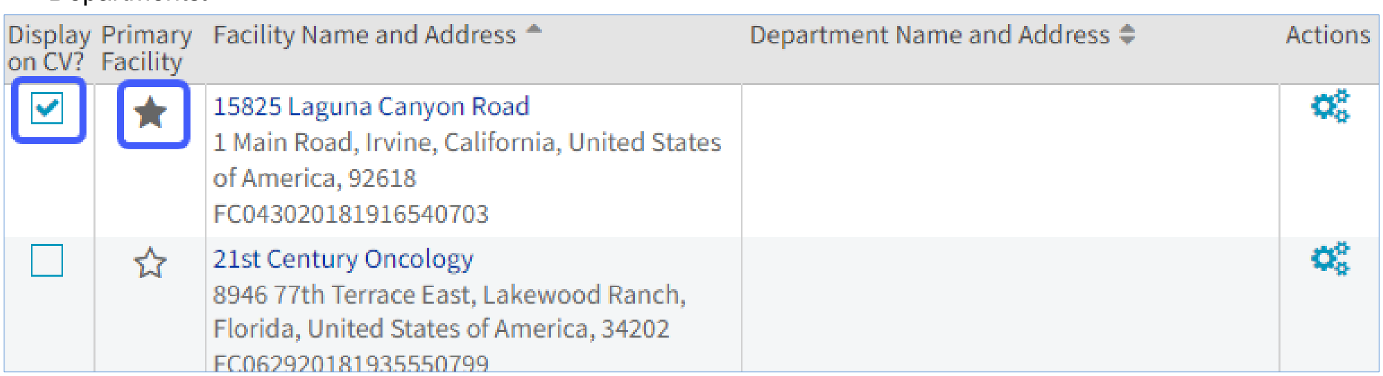
6. In **Add Department(s)** page, select one or more departments and click **Add Departments to your User Profile**.



7. You can click **Create New Department** or click **No Department** if the Facility does not have a department.
8. The Facilities section is updated with the details of the added facility.

How to add any Facilities and affiliated Departments that will be displayed in SIP Curriculum?

1. In the **My Facilities** page, in the **Display as CV?** column, select the check box to select Facilities and affiliated Departments.



2. Click on the Star ★ icon to choose one Facility as primary. Only one of the Facilities can be selected as Primary Facility. Department cannot be selected as the Primary facility. If you are not sure which Facility to use, then skip this step.

> *User's Primary Facility (where the Star icon is selected) will be listed first on the User's CV, if the same facility is selected as 'Display on CV?' (checkbox). The Primary Facility will always be listed first in the CV.*

3. Click **Generate CV**.

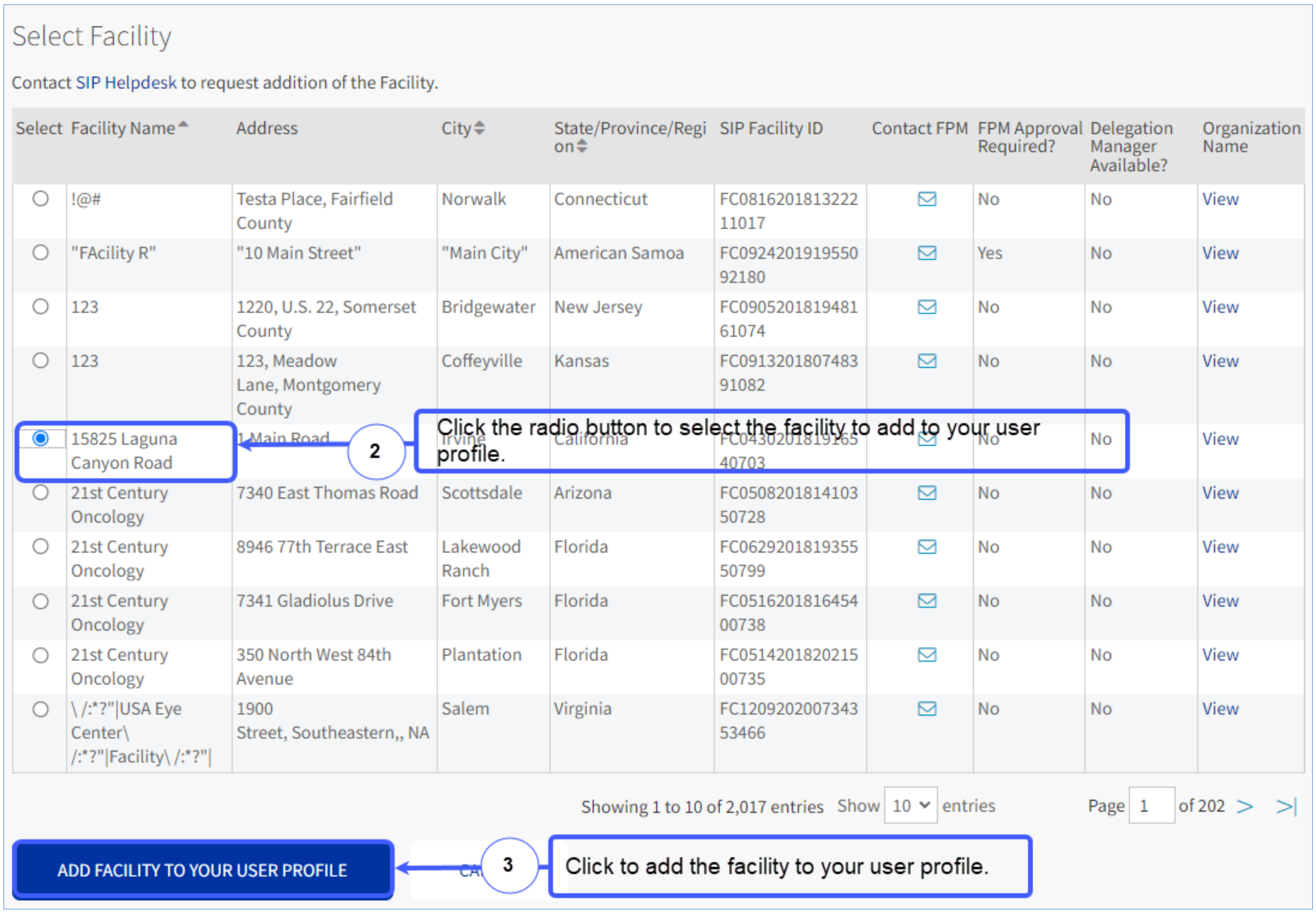
If you have not selected any facility to be displayed on your SIP CV, a warning message is diplayed. To continue to generate the CV, click Generate CV.

What if no Facility is returned in the search results?

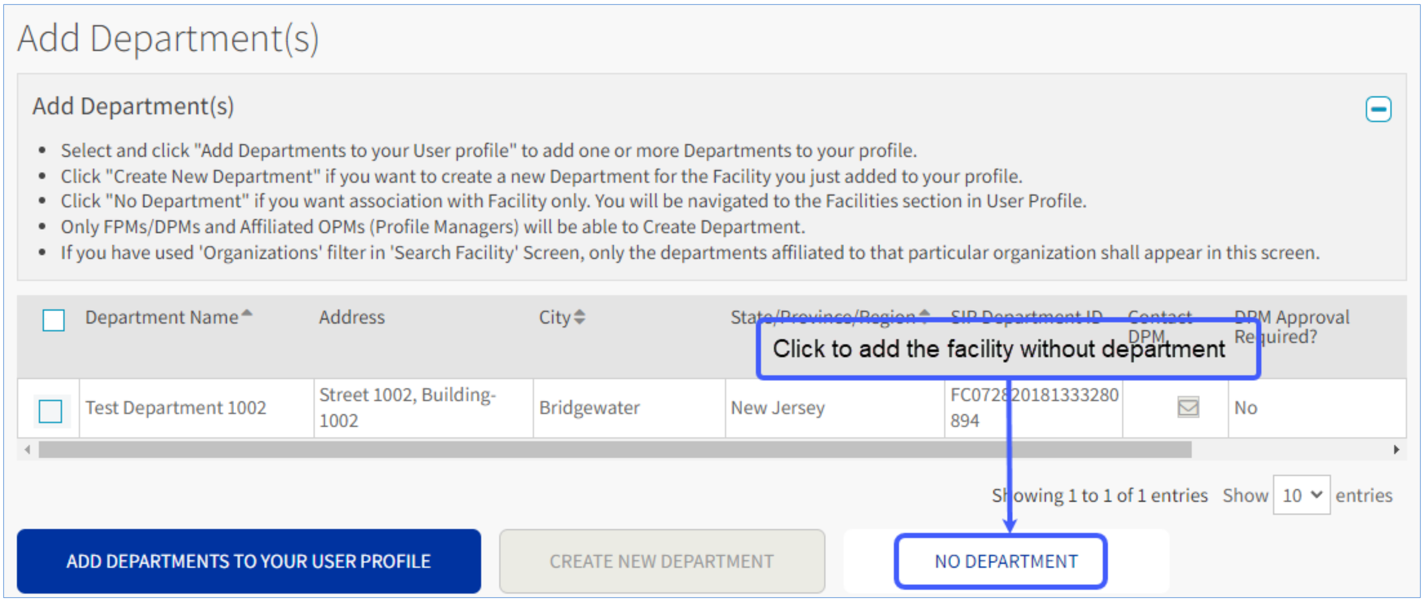
If a Facility Profile or Department Profile matching your search criteria is not found in SIP a message informing you to refine your search or contact the **SIP Helpdesk** to add a Facility, is displayed.

How do I select a Facility without a Department name?

1. Select or Add a Facility. To add a Facility, refer to Add a Facility to your User Profile.
2. If the Facility is an existing Facility, in the **Select Facility** section, select the Facility.



3. Click **Add Facility to your User Profile**.
4. In the **Add Department(s)** page, click **No Department**.



The newly added Facility is displayed in the Facilities section of the **My Profile** page.

- *To remove a Facility, My Profile > Facilities section, in the corresponding row, click [gear icon] and then click Remove Facility. You cannot remove a facility for which you are the FPM/DPM/Site Staff or if you are added to a Department within that Facility. In addition, you cannot remove facilities which are being onboarded to SIP as part of migration to the SIP platform.*
- *You can also add department or export a facility profile or send a message to the FPM by clicking [gear icon] and again clicking Add Department or Export Facility Profile, or Send Message to FPM, respectively.*

You can select a facility as your primary facility by clicking the star icon for that facility in the **Primary Facility** column of the **Facilities** section. A detailed description of the process of creating a Facility Profile or a Department Profile is documented in the SIP Site User Online Help.

7.1 Add Facility Contacts

After you add a Facility to your User Profile, you need to add the Facility Roles. Facility Roles include Primary Facility Profile Manager (FPM), Department Profile Manager (DPM), Facility Clinical Trial Contact (FCTC), Head of Facility (HoF), Head of Facility Delegate (HoFD), Budget/Financial Contact, Regulatory Contact (Facility/Department), Clinical Trial Manager, Contract Manager, Delegation Manager and Clinical Research Manager.

For more information on roles, refer to Facility Contacts in SIP Site User Online Help.

If no FPM or DPM is assigned to a facility or department, you can click the **assign FPM/DPM** icon in the **Actions** column of the **Facilities** section of the **My Profile** page. FPM or DPM can edit the Facility or Department Profile. FPM or DPM can also assign Delegation Managers for their Facility or Department.

Delegation Managers can set up and manage delegates on behalf of site users affiliated to the facility or department.

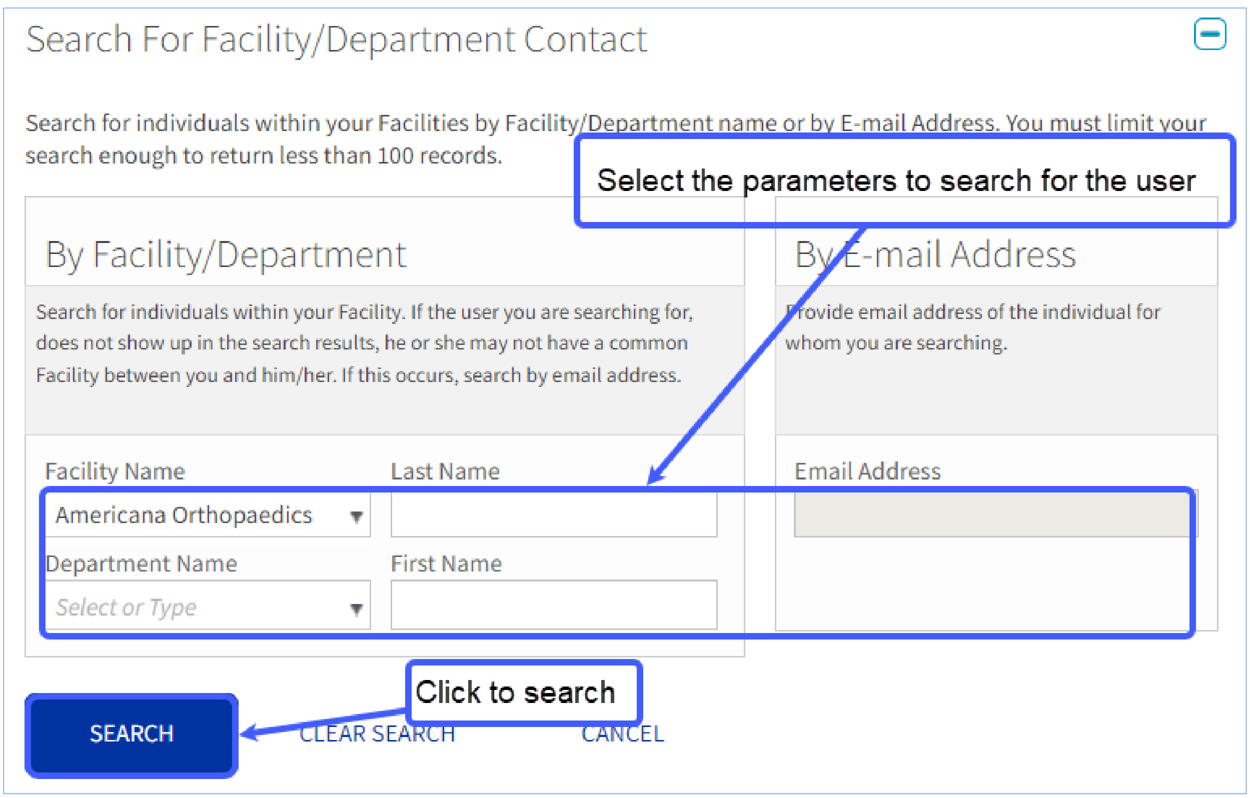
In the **Facility Contacts** page, perform any one of the following:

1. To delegate the task of completing the Facility Profile to another FPM/DPM user, click **Add Facility Contact**.

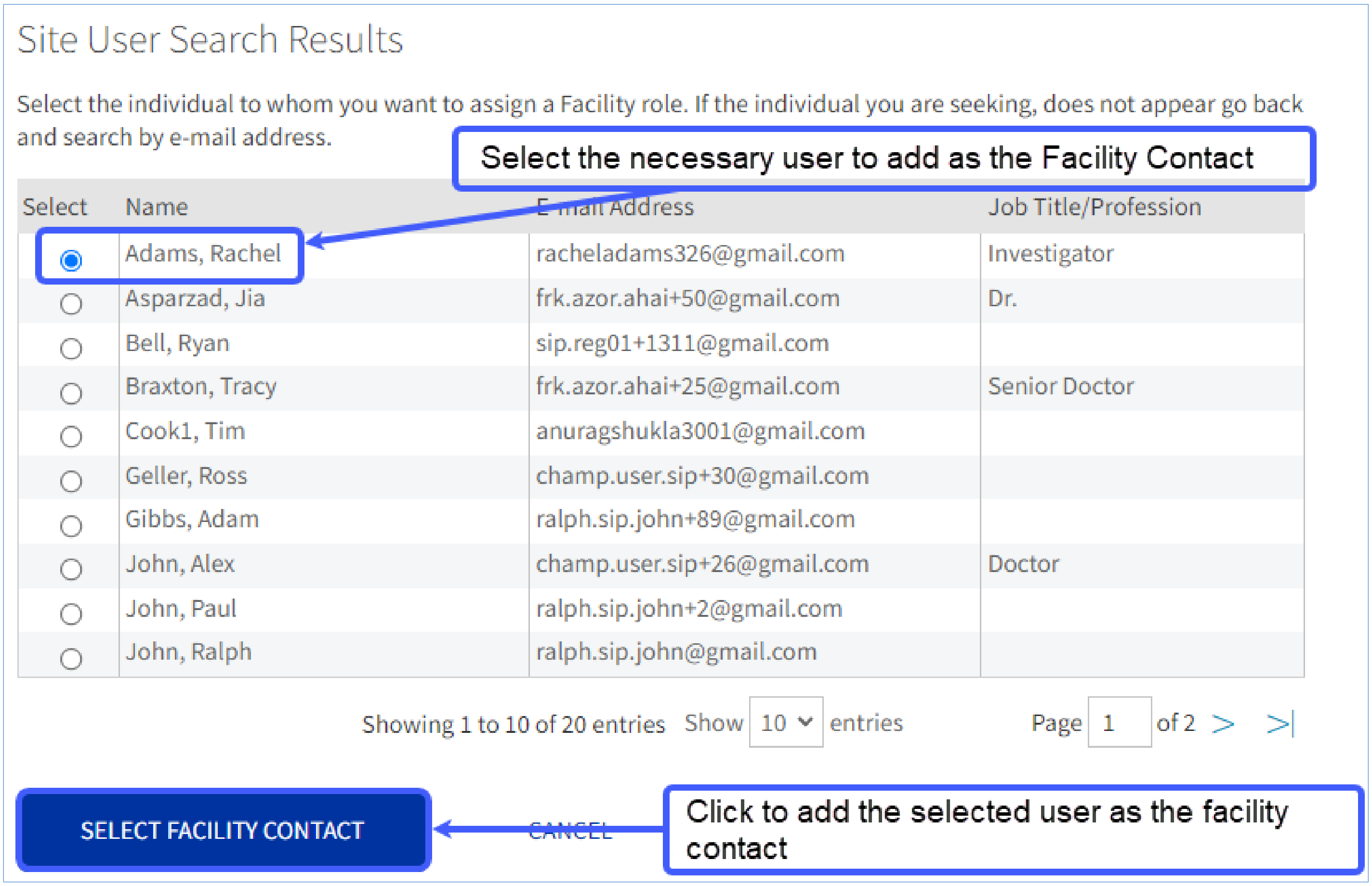
Select Primary FPM	Name	E-mail Address	Roles	Actions
★	John, Alex	champ.user.sip+26@gmail.com	Facility Profile Manager Clinical Research Manager Delegation Manager	
☆	Asparzad, Jia	frk.azor.ahai+50@gmail.com	Budget/Financial Contact	
☆	Braxton, Tracy	frk.azor.ahai+25@gmail.com	Regulatory Contact (Facility/Department)	
☆	John, Paul	ralph.sip.john+2@gmail.com	Contingency Contact - Business Delegation Manager	

Add Facility Contact

2. To search for Site Users within the Facility, in the **Facility/Department** section, type/select the search criteria.
3. To search for Site Users who do not belong to your Facility, in the **By Email Address** section, type/select the search criteria.



4. Click **Search**.
5. Select the required Site Users in the Site User Search Results section.

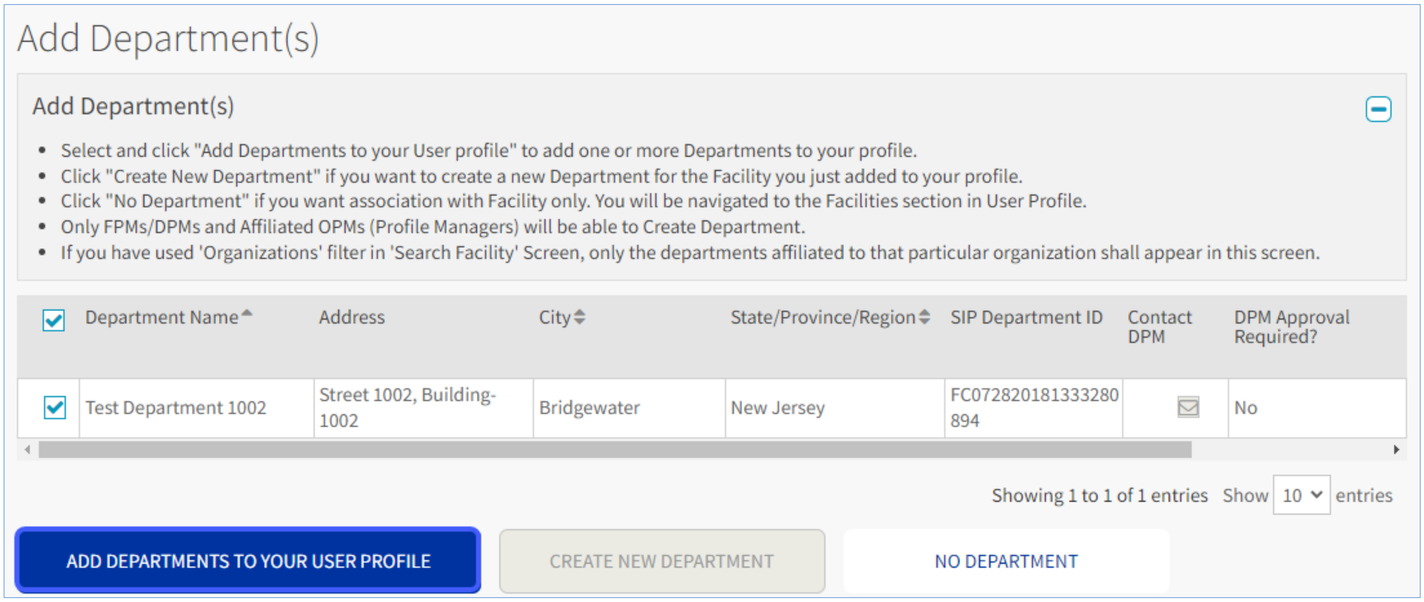


6. Click **Select Facility Contact**.

7.2 Add Department to your User Profile

You can add a Department to the Facility to associate yourself to the Department in the Facility.

1. On the **Facility** menu, click **My Facilities**.
2. To view departments for a specific Facility, in the corresponding row, click **View Departments** icon.
3. In the Departments in <Facility Name> section, the list of departments associated with the Facility is displayed.

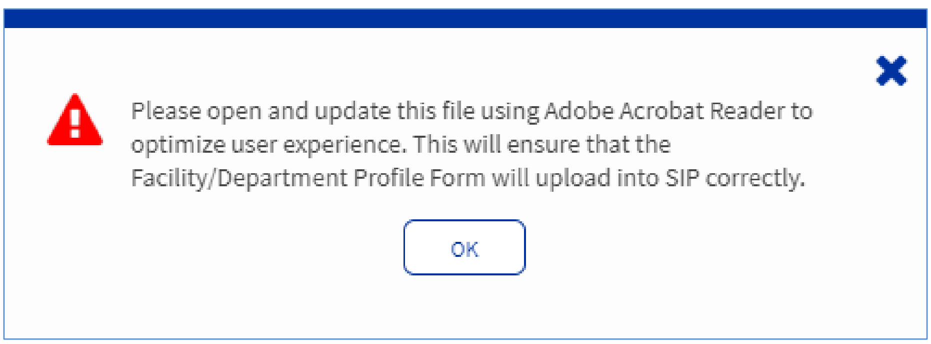


4. To add an existing department, select the existing department and click **Add Departments to your User Profile**.

1. To upload SIP Department Profile Form, click Upload SIP Department Profile Form.

2. Click Download SIP Department Profile Template.

All SIP Forms require Adobe Reader for an optimal user experience.



*3. Click **OK**.*

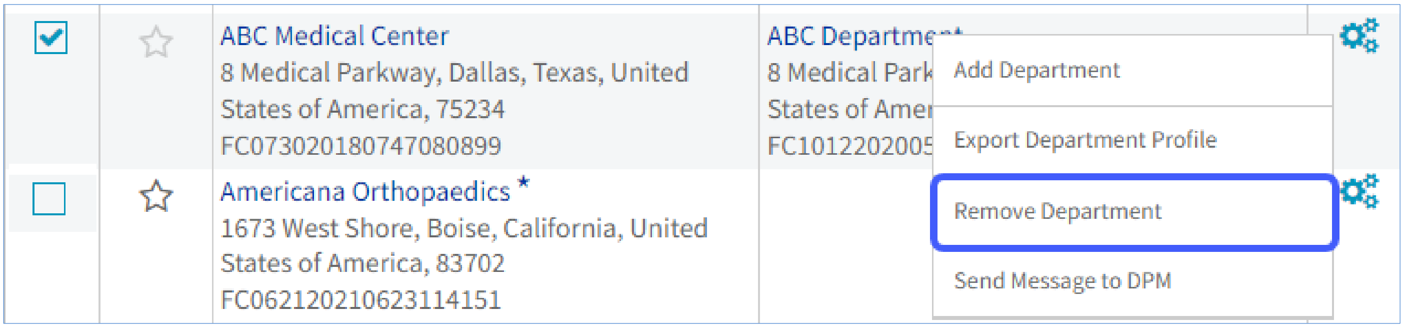
*4. To create a new department, in the Department (s) page, click **Create New Department**.*

*Otherwise, to continue associating the selected Facility Profile without selecting a Department, click **No Department**.*

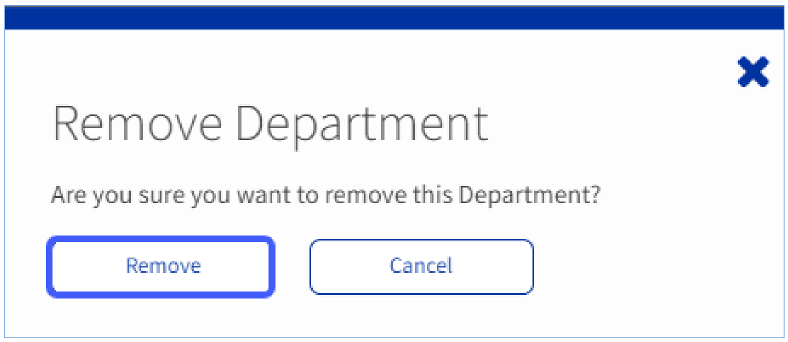
7.3 Remove Your Facility

You can remove a Facility and/or Department Profile from your User Profile, if you are no longer associated with the corresponding Research Facility and/or Department.

1. On the **User Profile—Facilities** page, under Action, click the icon in the row corresponding to the Facility and/or Department.



2. In the confirmation message, click **Remove**. The facility is removed.



However, you cannot remove a Facility and/or Department under the following circumstances:

- *If you are the Primary Facility Profile Manager of a Facility, you must assign another Primary Facility Manager, before you can remove your User Profile from the Facility.*
- *If you are the Principal Investigator or Study Site Staff working on an active Study at a Facility, you should not remove the Facility/Department from your User Profile.*
- *Contact the Sponsor User to request a Principal Investigator change for that Study.*

8 Preview SIP SIP CV

The **Preview SIP SIP CV** feature allows you to generate and view a print preview of your SIP CV from your current User Profile details.

9 Generate & E-sign SIP CV

The **Generate & e-Sign SIP CV** feature allows you to generate your CV from your current User Profile details.

9.1 Logic for Records Displayed in SIP CV

The SIP CV is designed as an SIP CV and displays only the important information from your user profile. When you generate an SIP CV, the number of records displayed in the different sections of the CV and the logic for the displayed details are as follows:

9.1.1 Basic Details

The SIP CV will display the latest details from your user profile.

9.1.2 Facilities

If you are associated with multiple facilities, the **Facilities** section shall display only 10 facilities as per the logic given below:

3. The selected primary facility shall be displayed first.

4. The list of facilities that have departments associated will be displayed in the ascending alphabetical order of facility name and department name.
5. The rest of the facilities with no departments will be displayed in the ascending alphabetical order of facility name.

9.1.3 Education

If you have multiple educational qualifications, the **Education** section shall display only 5 records on the generated CV as per the following logic:

The education details where Specialty is available shall be displayed on the CV, else the records shall be displayed in the descending order of the Year Completed.

9.1.4 Professional Experience

The **Professional Experience** section shall display only 5 records in the descending order of the Year Started.

9.1.5 Research Experience

If you have many years of research experience entered in your user profile, the details in **Research Experience** section of the SIP CV shall be displayed as follows:

1. The Study Types and Clinical Study Phases are displayed in the same order as they appear in the user profile.
2. The 'Therapeutic Area of Expertise' details are displayed separated by a semi-colon.
3. Only 15 records from the **Total Clinical Research Experience** section in the user profile shall be displayed in the descending order of the Number of completed studies followed by the descending order of ongoing studies.

9.1.6 GCP Training

The **GCP Training** section shall display only 1 record as per the logic given below:

1. Trainings in Certificate Valid or Completed status with latest Expiration Date shall be displayed first on the CV.
2. If there are no trainings available in certificate valid or completed status, then the Trainings in ‘Submitted’ or 'Sent for Review' status with the latest Expiration Date shall be displayed on the CV.
3. If the latest Expiration Date is the same for two records then the record shall be displayed in the ascending order of the course provider name.

9.1.7 License Details

The **License Details** section shall display only 5 records in the following order of License type:

1. Medical Doctor
2. License to practice
3. Physician Assistant
4. Other
5. Licenses whose Expiration Date has passed shall not be displayed on the CV.

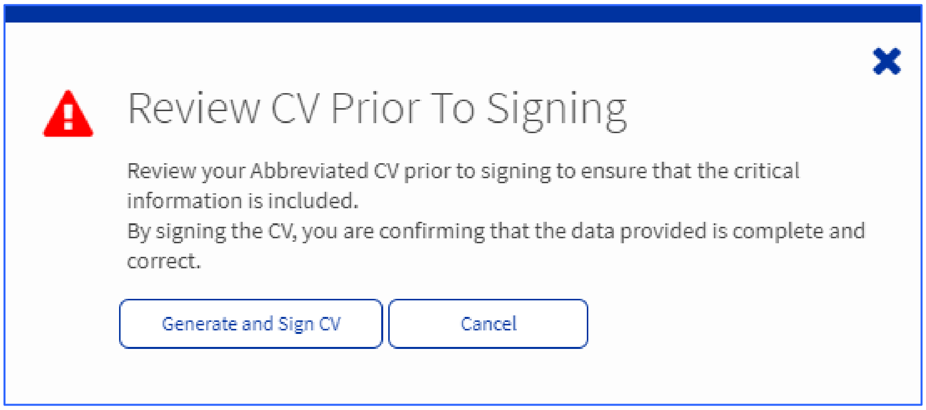
After you generate the CV, it becomes available to all the participating SIP Sponsors to whom the Site User has provided consent.

The CV will include the most important information from the User Profile and not all of the information will be available in the CV.

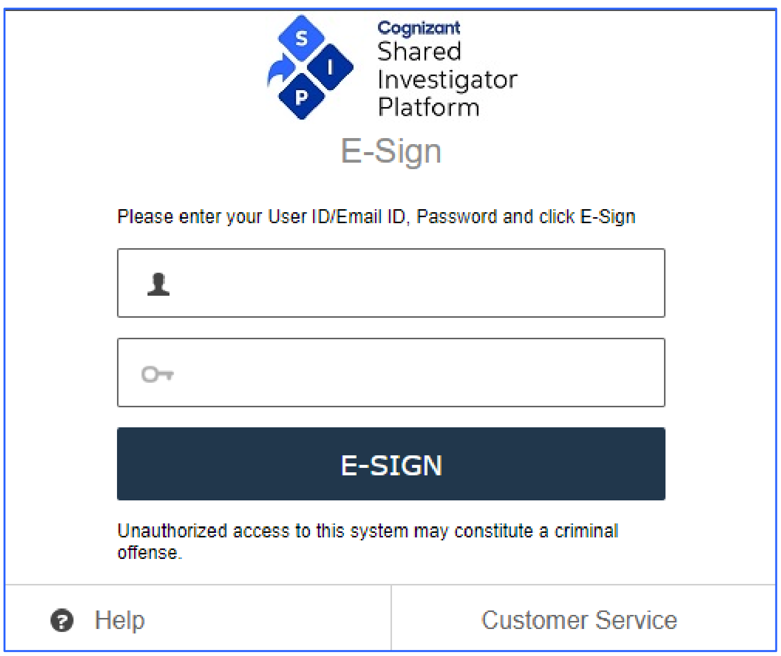
Each time you generate your CV or a Sponsor User downloads your CV, the CV history is updated on the CV History tab. For more information, refer to SIP CV History.

9.2 To Generate the Abbreviated CV

1. On the **User Profile** menu, click **My Profile**.
2. Click **Generate & eSign Abbreviated SIP CV**. The **Review CV Prior To Signing** screen appears.



3. Click **Generate and Sign CV**.
4. On the E-Sign page, in the **User ID** box, enter your User ID.
5. In the **Password** box, enter your password.
6. Click **E-Sign**.



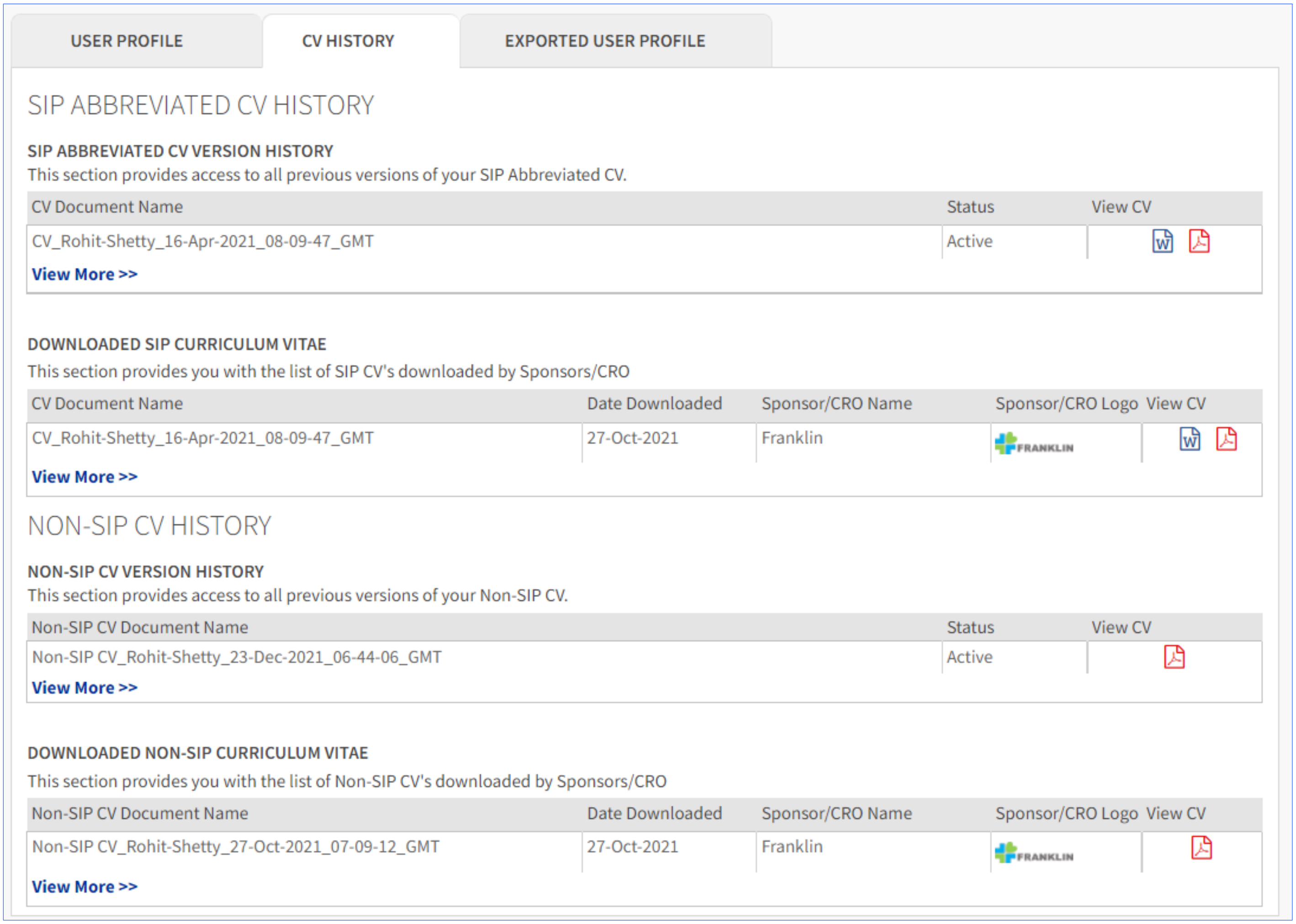
7. Click **OK**.

Site users will get a notification in SIP if the user has not regenerated the CV in the past 2 years. Notification is triggered if the Site user has neither regenerated the CV or uploaded Non-SIP CV in the past 2 years.

10 CV History

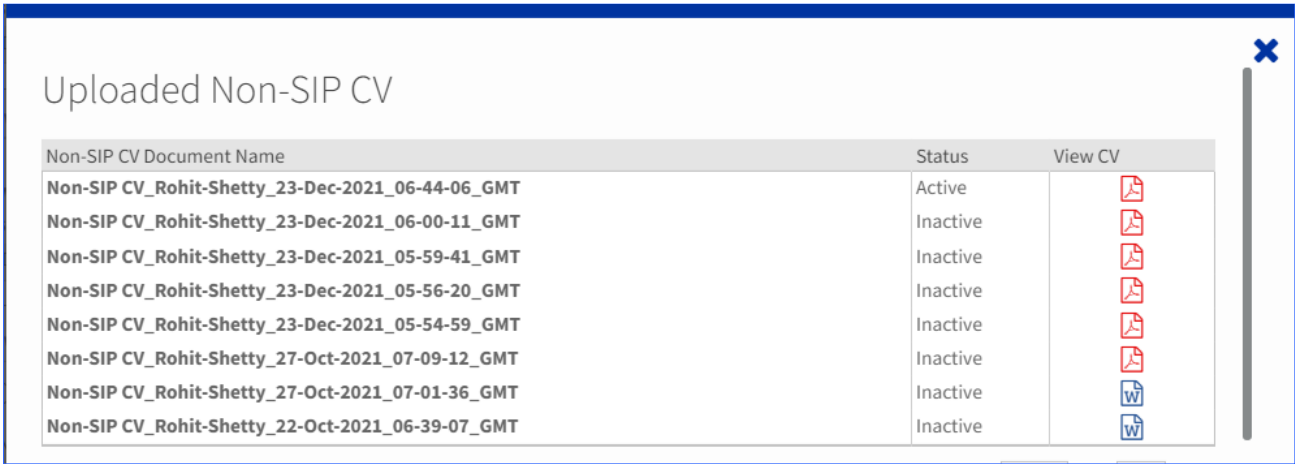
The **CV History** tab displays the details of all previous versions of your CV. If required, you can view and track significant changes made to the CV. This feature also allows you to download and view the different versions of your CV that were downloaded by Sponsor Users. The **CV History** tab is also available to the Delegate.

1. On the User Profile menu, click **My Profile**.
2. On the **My Profile** page, click the **CV History** tab to view your CV history.



- **SIP Abbreviated CV History**
  - **SIP Abbreviated CV Version History** section - displays the details of the latest active version of your CV.
    - **Word format**: Download and view your CV in Microsoft® Word format.
    - **PDF format**: Download and view your CV in **PDF** format.
    - **View More >>**: View all your CV generation records till date.
  - **Downloaded SIP Curriculum Vitae** section -Displays the download records of the latest active version of your CV by Sponsor Users to date.
    - **Word format:** Download and view your CV in Microsoft® Word format.
    - **PDF format:** Download and view your CV in PDF format.
    - **View More >>**: View the download records of all versions of your CV by Sponsor Users till date.

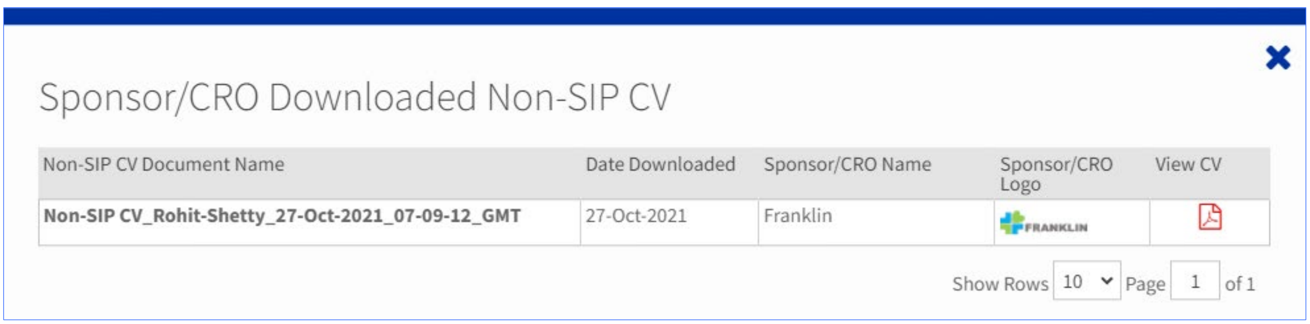
- **Non-SIP CV History**
  - **Non-SIP CV Version History** section - displays the details of the latest active version of your Non-SIP CV.



Uploaded Non-SIP CV

Non-SIP CV Document Name	Status	View CV
Non-SIP CV_Rohit-Shetty_23-Dec-2021_06-44-06_GMT	Active	
Non-SIP CV_Rohit-Shetty_23-Dec-2021_06-00-11_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_23-Dec-2021_05-59-41_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_23-Dec-2021_05-56-20_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_23-Dec-2021_05-54-59_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_27-Oct-2021_07-09-12_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_27-Oct-2021_07-01-36_GMT	Inactive	
Non-SIP CV_Rohit-Shetty_22-Oct-2021_06-39-07_GMT	Inactive	

  - **Word format**: Download and view your Non-SIP CV in Word format.
  - **PDF format**: Download and view your Non-SIP CV in **PDF** format.
  - **View More >>**: View all your Non-SIP CV generation records till date.
- **Downloaded Non-SIP Curriculum Vitae** section - Displays the download records of the latest active version of your CV by Sponsor Users to date.



Sponsor/CRO Downloaded Non-SIP CV

Non-SIP CV Document Name	Date Downloaded	Sponsor/CRO Name	Sponsor/CRO Logo	View CV
Non-SIP CV_Rohit-Shetty_27-Oct-2021_07-09-12_GMT	27-Oct-2021	Franklin	FRANKLIN	

Show Rows 10 Page 1 of 1

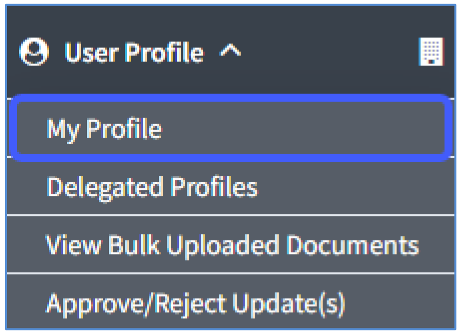
The Non-SIP CV document can be downloaded only in the same format as it was uploaded to SIP. Only the Sponsors to whom the site user has consented will be able to pull the site user's CV or access their User Profile page.

  - **Word format:** Download and view your Non-SIP CV in Word format.
  - **PDF format:** Download and view your Non-SIP CV in PDF format.
  - **View More >>**: View the download records of all versions of your Non-SIP CV by Sponsor Users till date.

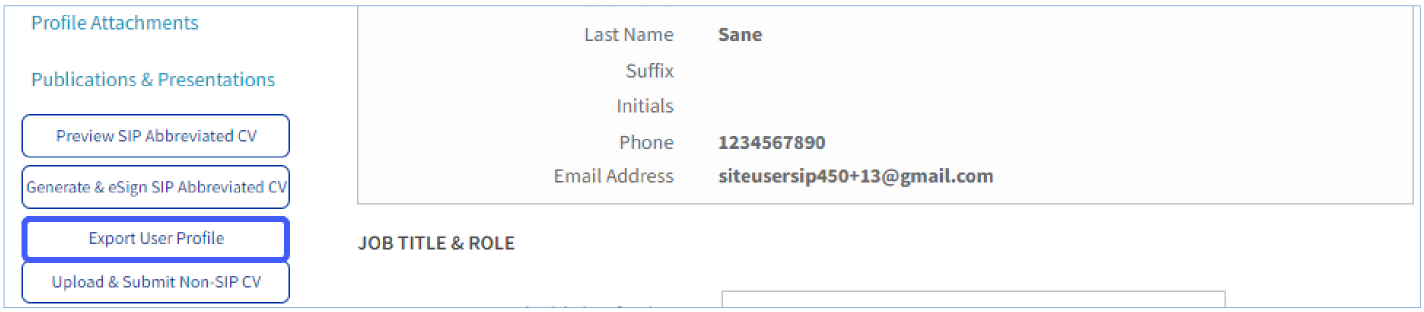
11 Export User Profile

The Profile Export varies from CV generation since more data related to sections like personal information, facility details, and education, professional experience, research experience, license details, can be exported. The Export User Profile option does not include any attachments. The Export feature provides a detailed view of the User Profile and may be utilized at any time.

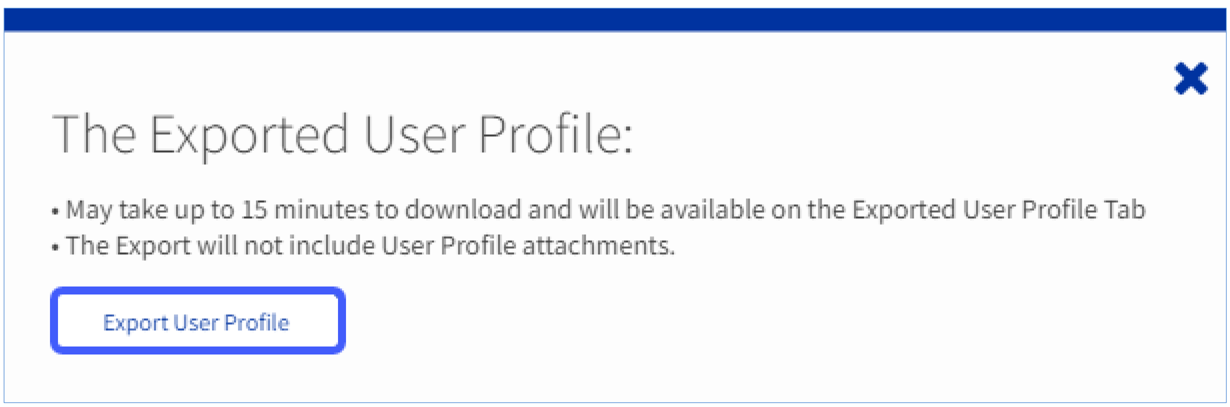
1. On the **User Profile** menu, click **My Profile**.



2. Click **Export User Profile**.



3. In the **Export User Profile** dialog box, click **Export User Profile**.



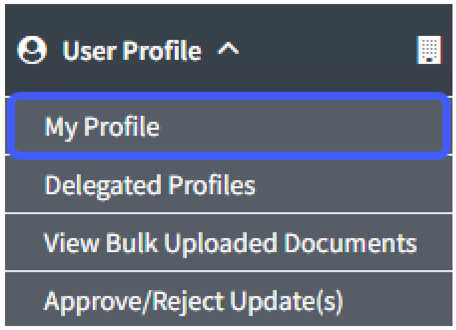
It will take around 15 minutes to export your User Profile.

4. On the **Exported User Profile** page, you will see the Export in Progress status. Click the refresh icon to view the exported User Profile. To download the User Profile in Word or PDF format, click the Word Format or PDF Format buttons respectively.

12 Exported User Profile

The **Exported User Profile** tab displays your exported SIP User Profile. This section provides access to your exported SIP User Profile.

1. On the **User Profile** menu, click **My Profile**.

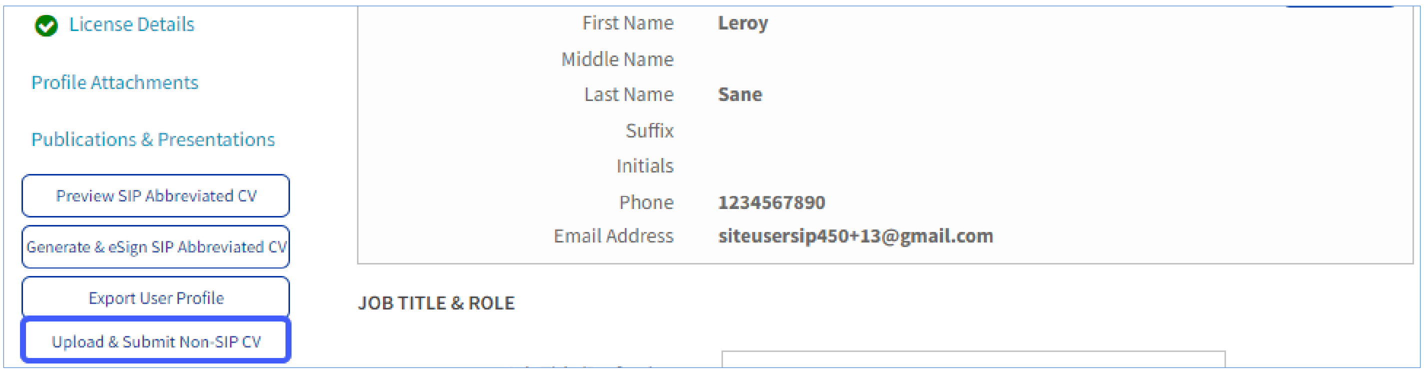


2. On the **My Profile** page, click the **Exported User Profile** tab to view the user profile that you exported.

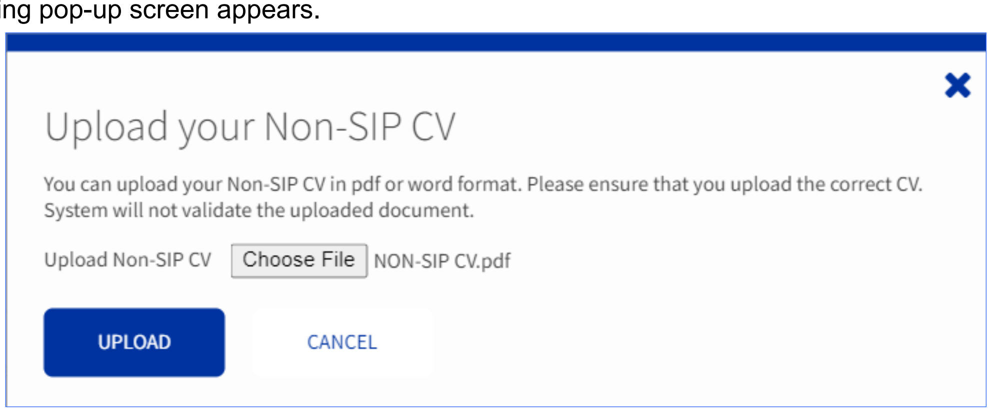
13 Upload & Submit Non-SIP CV

The **Upload & Submit Non-SIP CV** feature allows you to upload a CV generated outside SIP in the PDF or Word format.

1. On the **My Profile** page, click **Upload & Submit Non-SIP CV**.



2. The following pop-up screen appears.



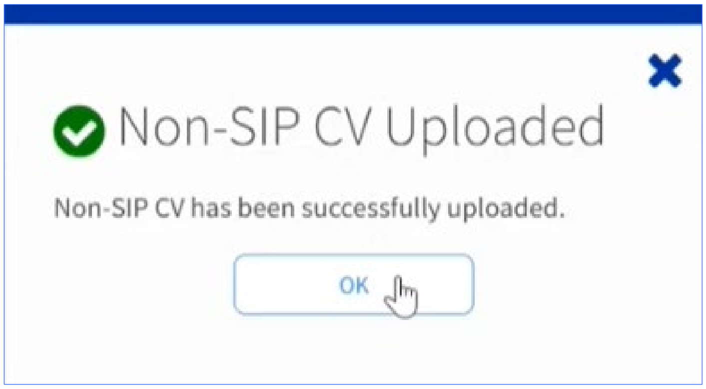
3. Click **Choose File** to select the Non-SIP CV document to be uploaded.

The Non-SIP CV document can be uploaded in the PDF or Word document.

⚠	*The Non-SIP CV document can be downloaded only in the same format as it was uploaded to SIP.*

8. Click **Upload**.

The following message is displayed when the Non-SIP CV is successfully uploaded to SIP.



The uploaded Non-SIP CV document is now displayed in the **Non-SIP CV Version History** section of the **CV History** tab**.**

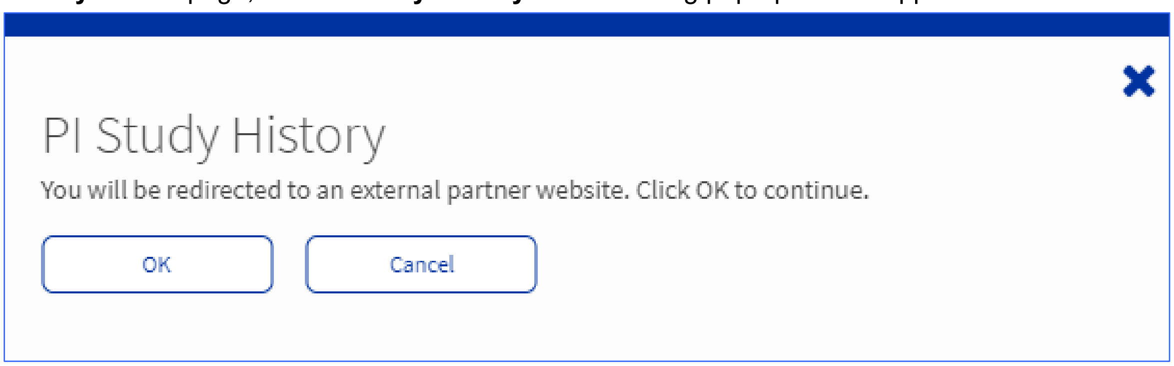
The Uploaded Non-SIP CV document is flown to **Study Documents** Library for all the studies associated with the site user depending on the document management system used by the study.

Refer to the **Non-SIP CV Version History** section of the **CV History** tab for more information on how to view SIP and Non-SIP Generated CV information.

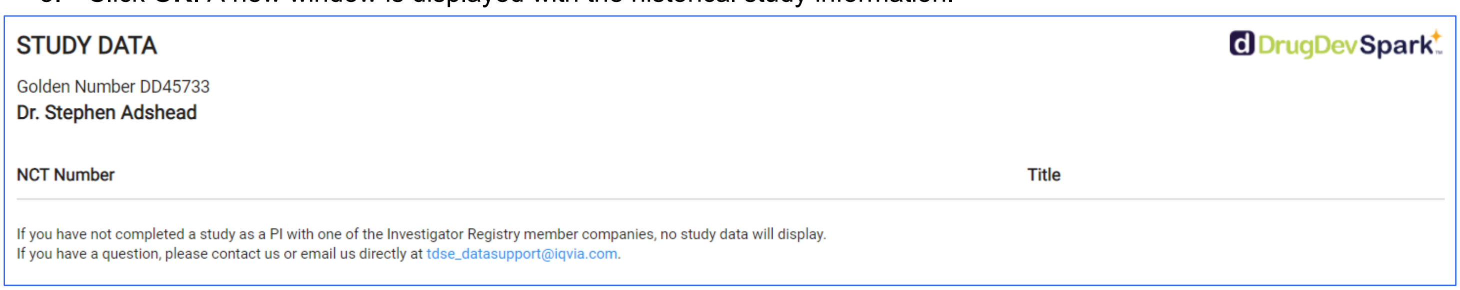
14 Historical Study Information

Investigators can view the study history and associated metrics from SIP.

1. On the **User Profile** menu, click **My Profile**.
2. On the **My Profile** page, click **PI Study History**. The following pop-up screen appears.

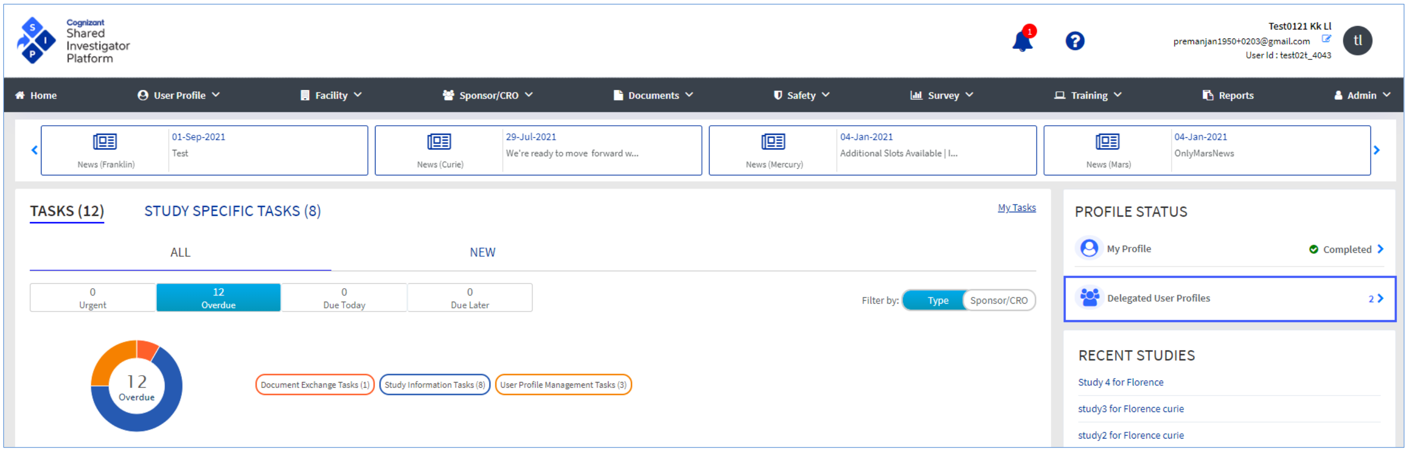


3. Click **OK**. A new window is displayed with the historical study information.



15 Delegated User Profile - Update a User Profile Delegated to You

You can view the user profiles delegated to you under the **Profile Status** section in **Delegated User Profile sub-section** of the **SIP Landing page**.

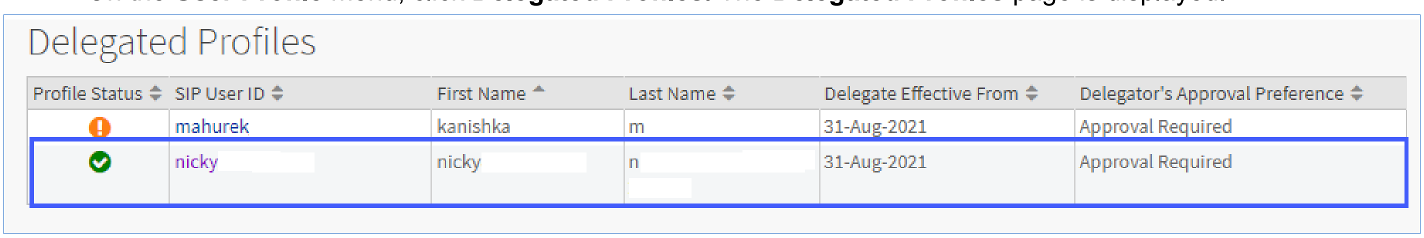


Or,

You can also be view the delegated user profiles from the **Delegated Profiles** page on the **User Profile** menu.

To view the delegated user profiles:

1. On the **SIP Site User Landing** page, in the **Profile Status** section, click the arrow or the number displayed on the Delegated User Profile. The number indicates the total number of User Profiles delegated to you.
   Or,
   On the **User Profile** menu, click **Delegated Profiles**. The **Delegated Profiles** page is displayed.



Delegated Profiles

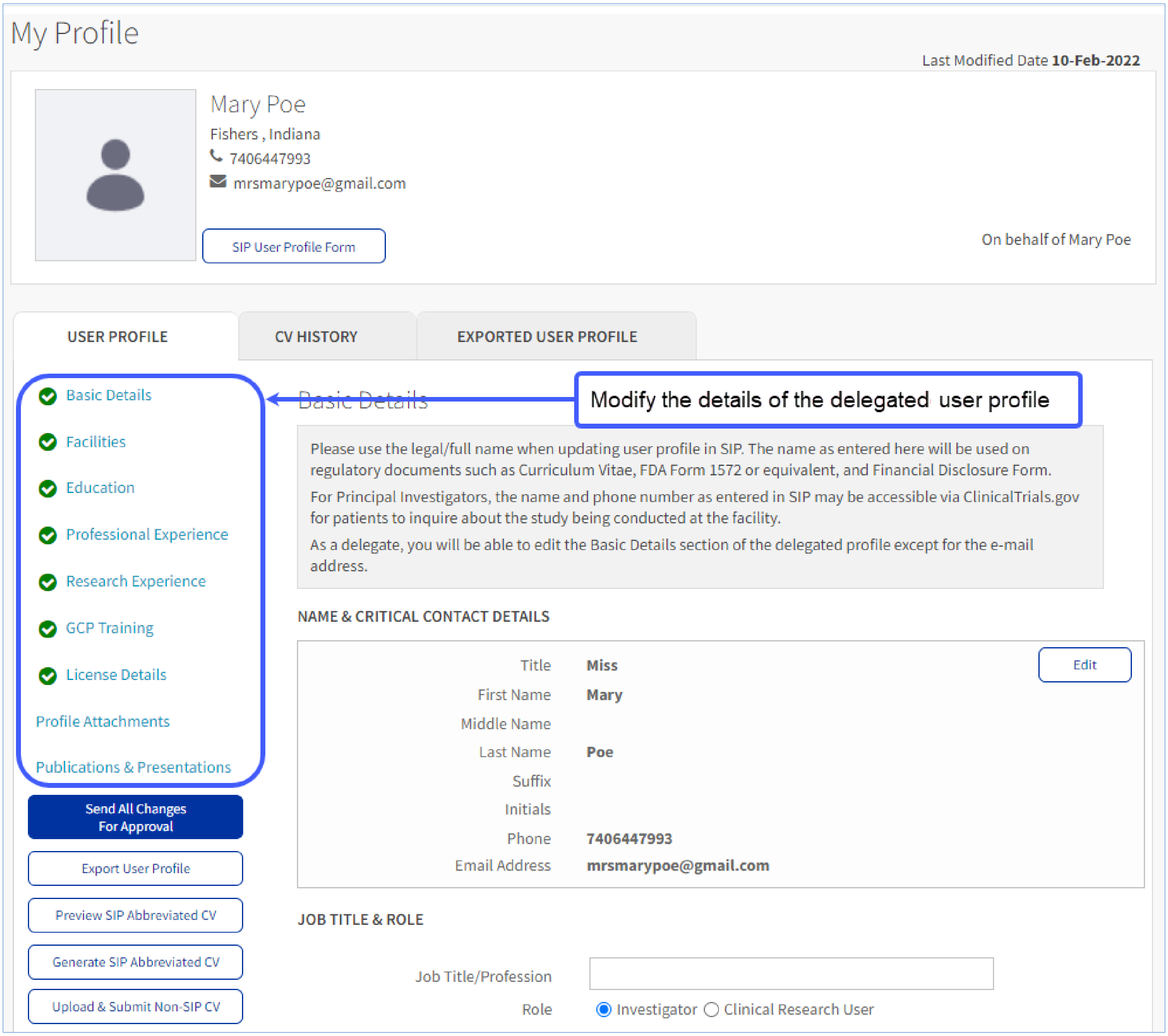
Profile Status	SIP User ID	First Name	Last Name	Delegate Effective From	Delegator's Approval Preference
	mahurek	kanishka	m	31-Aug-2021	Approval Required
	nicky	nicky	n	31-Aug-2021	Approval Required

The following details are displayed on the **Delegated Profiles** page:

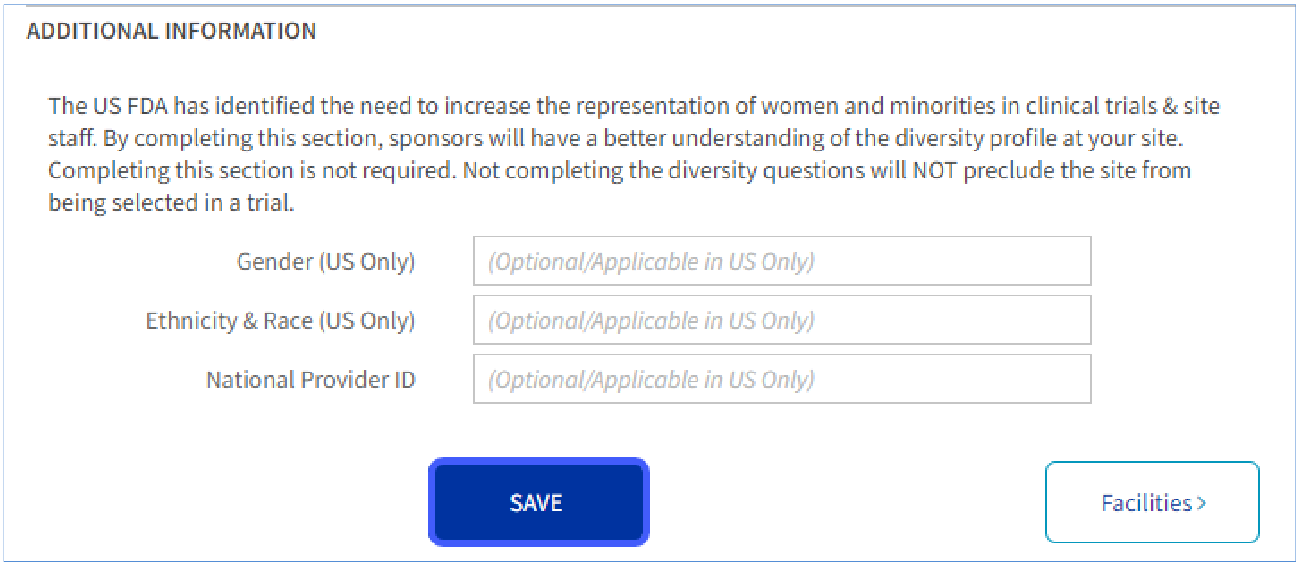
- Delegator's User Profile Completion Status,
- Delegator's SIP User ID,
- Delegator's First Name and Last Name,
- Date the profile was delegated,
- Delegator's Approval Preferences.

2. Click the SIP User ID of the Site User whose User Profile you want to update.

As a Delegate, you can modify all the Basic Details except the email address of the actual Profile Owner.



3. The **My Profile** page of the Delegator will be displayed.
4. Update the User Profile details.



5. Click **Save** and then click **OK**.
6. In the User Profile navigation pane, click **Send All Changes for Approval**. This depends on the User Profile Approval Flag settings configured by the Delegator. Refer to Step 3: Configuring User Profile Approval Settings (User Profile Owner) section for more information.
7. All your changes in the User Profile are sent to the User Profile Owner for approval and a confirmation message is displayed.
8. Click **OK**.

> ***Send All Changes For Approval*** *button performs an implicit save and sends the data for approval, even if the* ***Save*** *button had not been clicked for the particular section.*

16 Delegates - Bulk Upload

The **Bulk Upload** option allows delegates to upload multiple documents for multiple investigators at once. Delegates can bulk upload the following types of documents on behalf of the profile owners:

- License Details
- Profile Attachments
- Non-SIP CV
- GCP Training Credit Request

16.1 Points to Remember for Bulk Upload by Delegates

2. The **GCP Training credit Request** and **Non-SIP CV** documents uploaded by a delegate are auto-approved even when the User Profile Setting is set as **Approval Required**.
3. When bulk-uploading documents for **Profile Attachments** and **License Details** for delegated user profiles,

- If there are changes pending Delegator's approval for the user profile section, then delegate won't be able to bulk upload documents for that user profile section. Hence before bulk uploading, ensure that there are no changes pending approval from Delegator for the section.
- If there are no changes pending, the documents uploaded through bulk upload will be auto-approved even when the User Profile Setting is **Approval Required**.

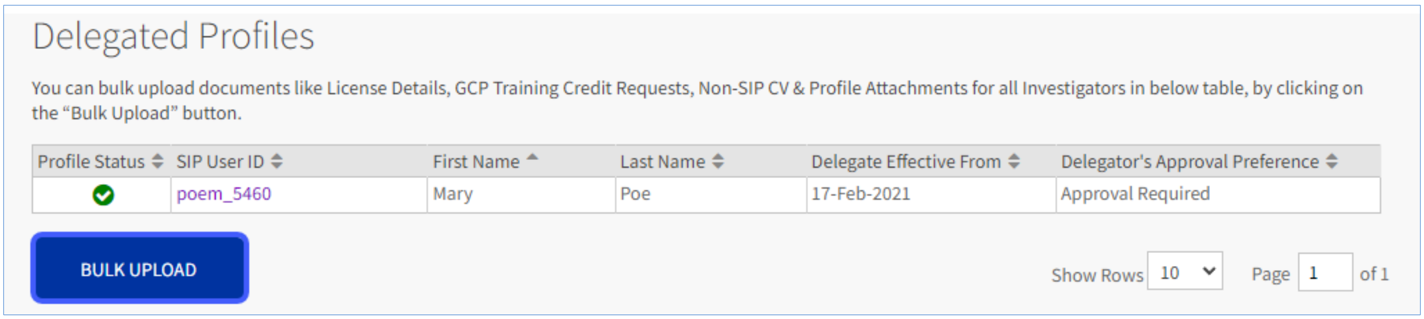
4. For MRT GCP credit requests submitted by the delegate for courses listed in SIP, system will create one request ID per course title/user across all adopting sponsors.
5. For GCP credit requests submitted by the delegate for courses not listed in SIP, system will create one request ID per course title/user/associated sponsor. i.e. system will treat it as an NMRT.
6. Delegates can view the details of their past bulk uploads in the **View Bulk Uploaded Documents** screen even after being removed from the delegate role.

16.2 Bulk Upload License Details

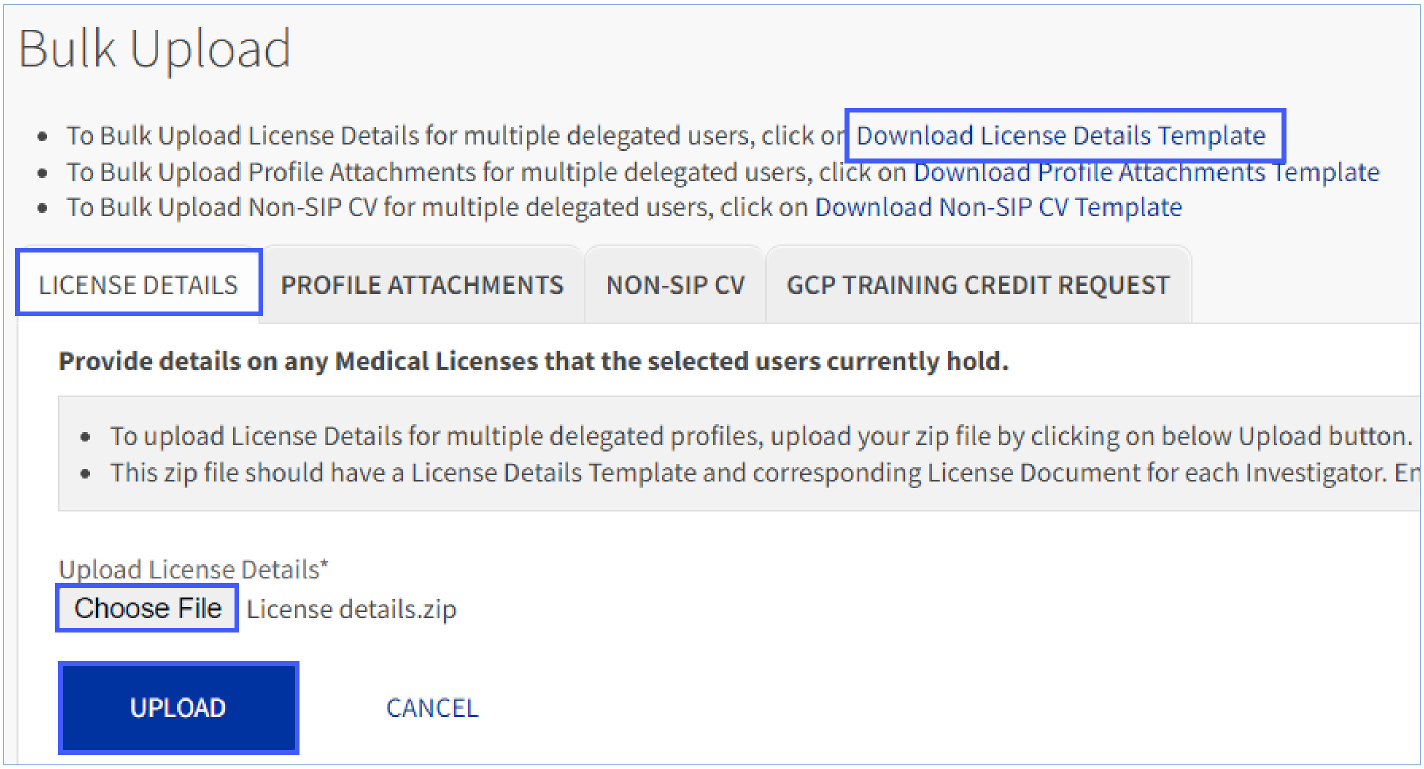
Delegates can bulk upload License Details for multiple Investigators using the **License Details Template**.

To Bulk Upload License Details

1. On the menu bar, click **User Profile**, and then select **Delegated Profiles**. The **Delegated Profiles** page is displayed.



2. Click **Bulk Upload**. The **Bulk Upload** page appears, and the **License Details** tab is displayed by default.



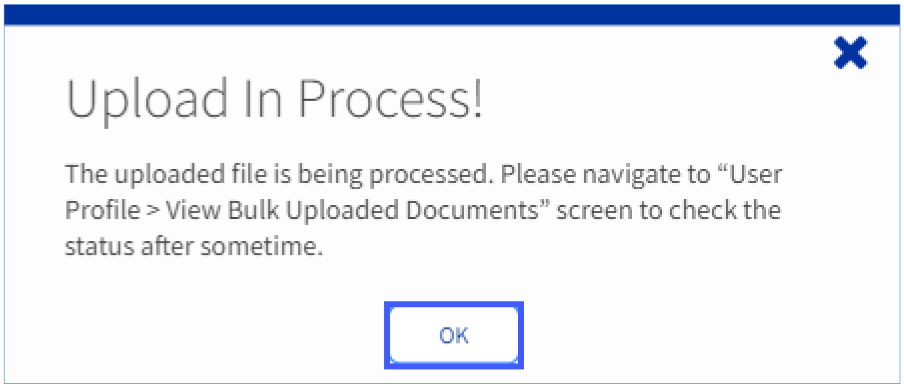
3. Click **Download License Details Template** to download the excel template for bulk uploading license details.

> 1) *Refer to the **Read Me** sheet in excel template for information on the mandatory fields and specific instructions on template upload.*
> 2) *The **First Name, Last Name** and **Email Address** details of all the profiles delegated to the site user are pre-populated in the License Details excel template. Do not modify the pre-populated information otherwise it will give an error.*
> 3) *The file name of the supporting license document (with extension) should be entered in **Document Name** column of excel template. This is case-sensitive so ensure that it is an exact match otherwise an error will be displayed.*
> 4) *Multiple entries for the same site user are allowed.*

4. Once all details are filled in the template, zip the file containing License Details Template and corresponding License Documents for each Investigator. License Details Template and license documents should be in the same folder otherwise an error will be displayed.
5. Click **Choose File** to select the zip file that contains the excel template and the supporting license documents.

> *1) If any other file other than a ZIP format is selected for upload, error pop-up box appears.*
> *2) The maximum file size allowed is 50 MB. If the file size limit is exceeded, error pop-up box appears.*

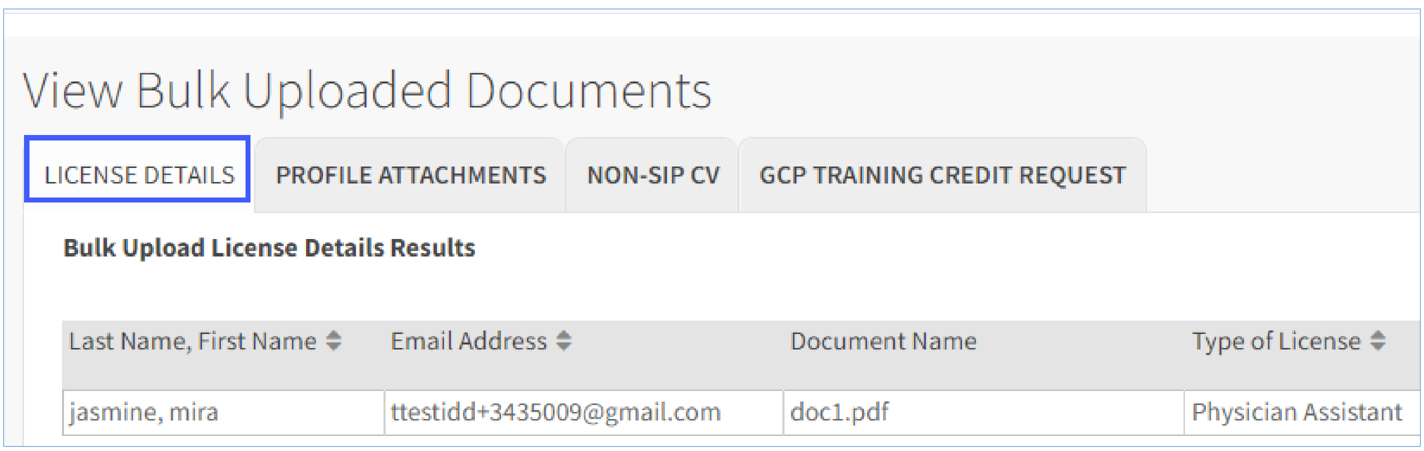
6. Click **Upload** after selecting the zip file. The following pop-up message appears.



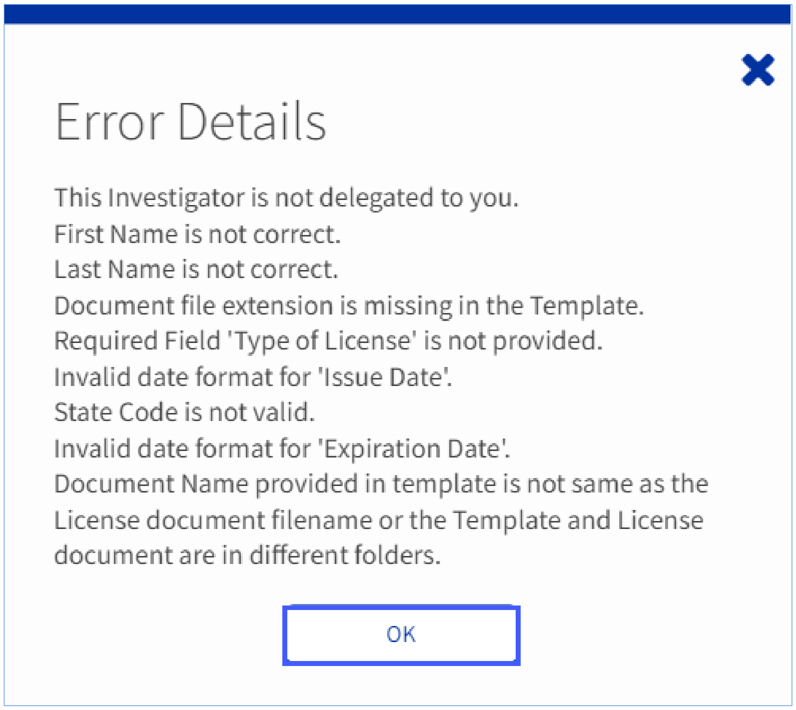
1) A notification is triggered to the Delegate once all the records in the zip file are successfully processed.

2) If a wrong License Details excel template, i.e, wrong column sequence, wrong fromat, or empty template, is uploaded as part of the zip file, the upload process stops and an alert is sent to the Delegate.

7. To view the status of the uploaded documents, click **User Profile**, and then select **View Bulk Uploaded Documents**.



8. The following are the statuses available for the records being uploaded:
   - **Processing** - the documents are currently being processed for upload.
   - **Error** - an error has occurred when uploading the documents. Failed records are marked as error with a hyperlink in the **Uploaded Status** column of the **View Uploaded Documents** screen.
   - **Uploaded** - the document has been successfully uploaded. Respective updates will be visible in Investigator's User Profile section.
9. Clicking on the Error hyperlink displays all the errors associated with the record. The following screen appears.



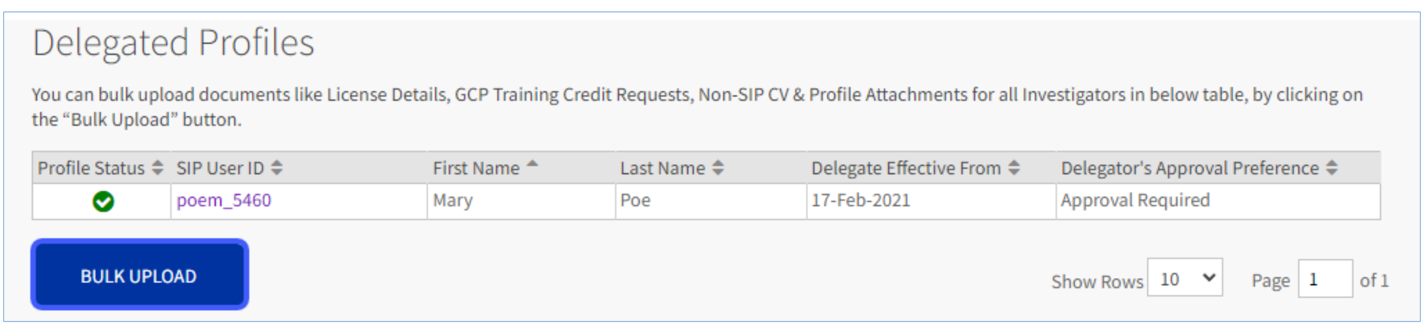
10. Click on **Export** to download all the bulk-uploaded **License Details** records by the delegate in excel format. Users can also print all the records displayed in View Bulk Uploaded Documents screen using the **Print** option.

16.3 Bulk Upload Profile Attachments

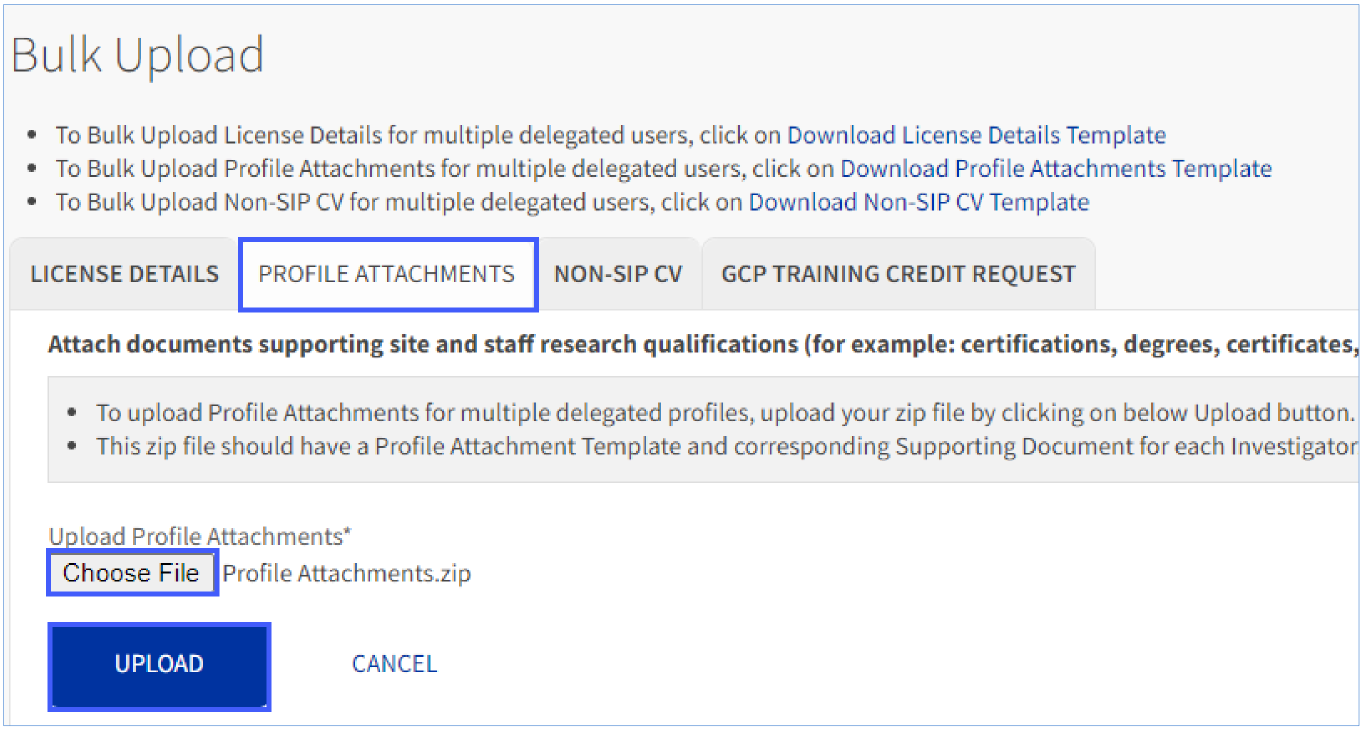
Delegates can bulk upload Profile Attachments details for multiple Investigators using the **Profile Attachments Template**.

To Bulk Upload Profile Attachments

1. On the menu bar, click **User Profile**, and then select **Delegated Profiles**. The **Delegated Profiles** page is displayed.



2. Click **Bulk Upload**. The Bulk Upload page appears. Select the **Profile Attachments** tab.



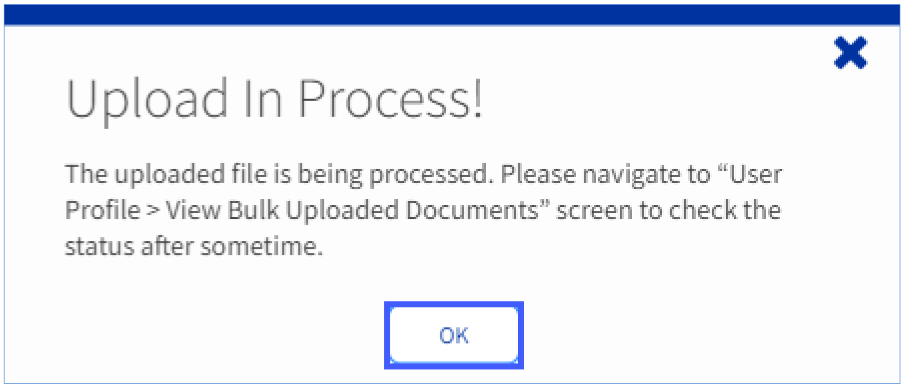
10. Click **Download Profile Attachments Template** hyperlink to download the excel template for bulk uploading Profile Attachments.

*1) Refer to the **Read Me** sheet in excel template for information on the mandatory fields and specific instructions on template upload.*
*2) The **First Name, Last Name** and **Email Address** details of all the profiles delegated to the site user are pre-populated in the Profile Attachment excel template. Do not modify the pre-populated information otherwise it will give an error.*
*3) The file name of the supporting document (with extension) should be entered in **Document Name** column of excel template. This is case-sensitive so ensure that it is an exact match otherwise an error will be displayed.*
4) Multiple entries for the same site user are allowed.

11. Once all details are filled in the template, zip the file containing Profile Attachment Template and corresponding Supporting Document for each Investigator. Profile Attachment Template and supporting document should be in the same folder otherwise an error will be displayed.
12. Click **Choose File** to select the zip file that contains the excel template and the supporting documents for the user profile.

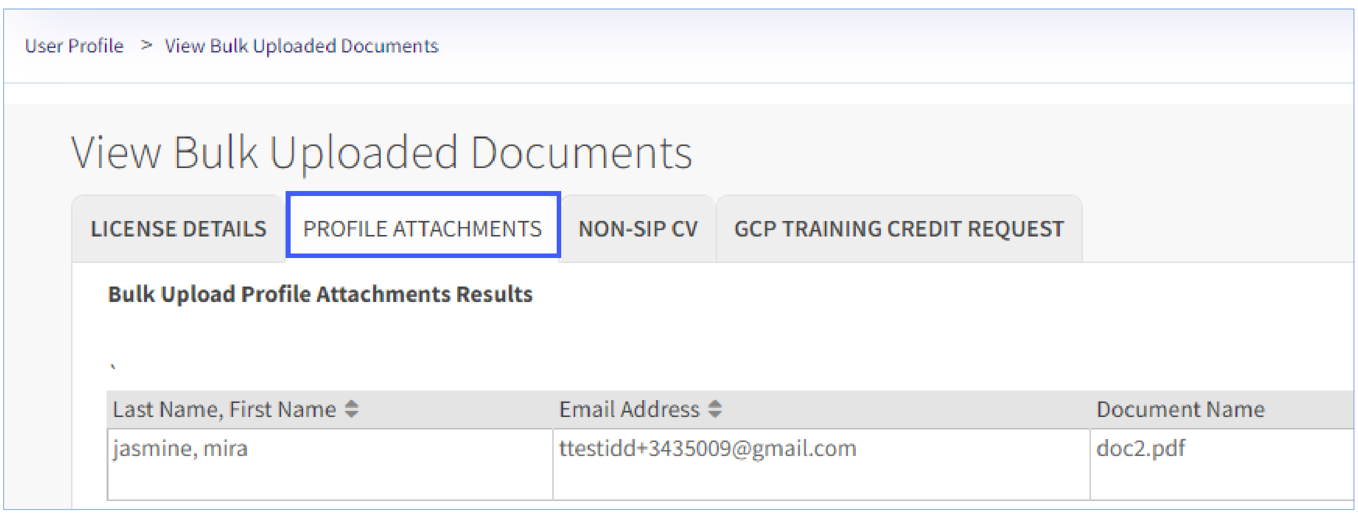
1) If any other file other than a ZIP format is selected for upload, error pop-up box appears.
2) The maximum file size allowed is 50 MB. If the file size limit is exceeded, error pop-up box appears.

13. Click **Upload** after selecting the zip file. The following pop-up message appears.

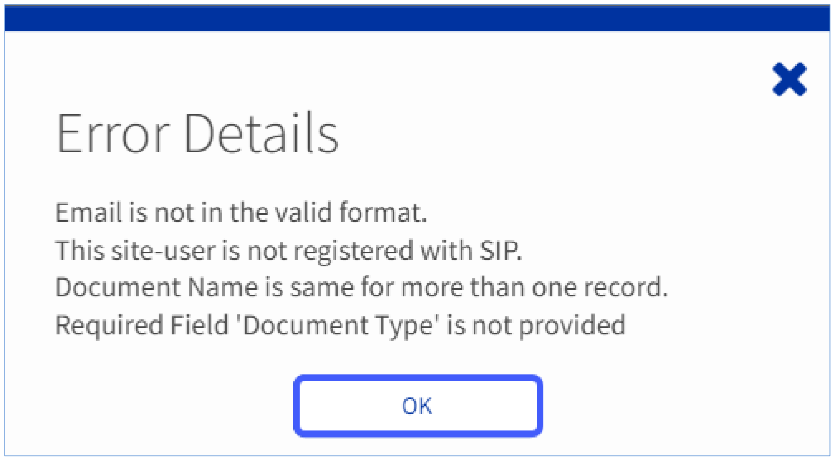


1) *A notification is triggered to the Delegate once all the documents in the zip file are successfully processed.*
2) *If a wrong Profile Attachments Excel template is uploaded, i.e, wrong column sequence, wrong fromat, or empty template, is uploaded as part of the zip file, the upload process stops and an alert is sent to the Delegate.*

14. To view the status of the uploaded documents, click **User Profile**, and then select **View Bulk Uploaded Documents**.



15. The following are the statuses available for the records being uploaded:
    - **Processing** - the documents are currently being processed for upload.
    - **Error** - an error has occurred when uploading the documents. Failed records are marked as error with a hyperlink in the **Uploaded Status** column of the **View Uploaded Documents** screen.
    - **Uploaded** - the document has been successfully uploaded. Respective updates will be visible in Investigator's User Profile section.
16. Clicking on the Error hyperlink displays all the errors associated with the record. The following screen appears.



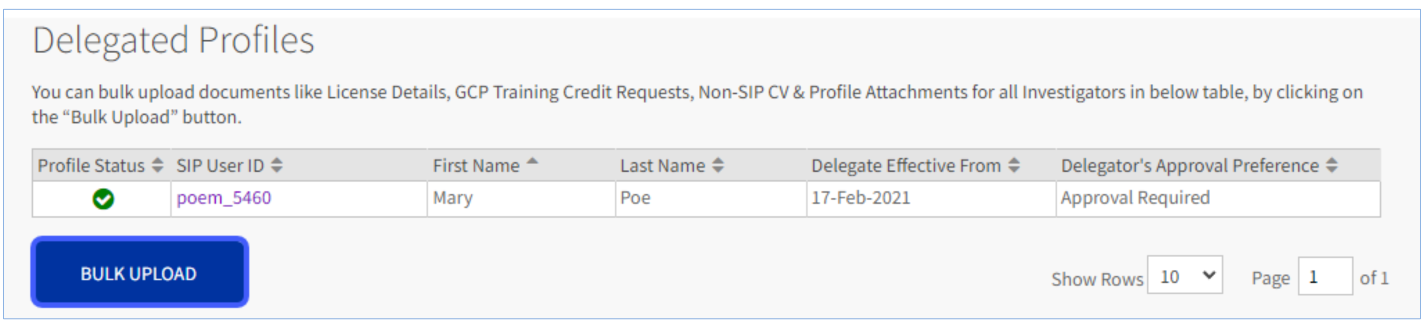
10. Click on **Export** to download all the bulk-uploaded **Profile Attachments** records by the delegate in excel format. Users can also print all the records displayed in View Bulk Uploaded Documents screen using the **Print** option.

16.4 Bulk Upload NON-SIP CV

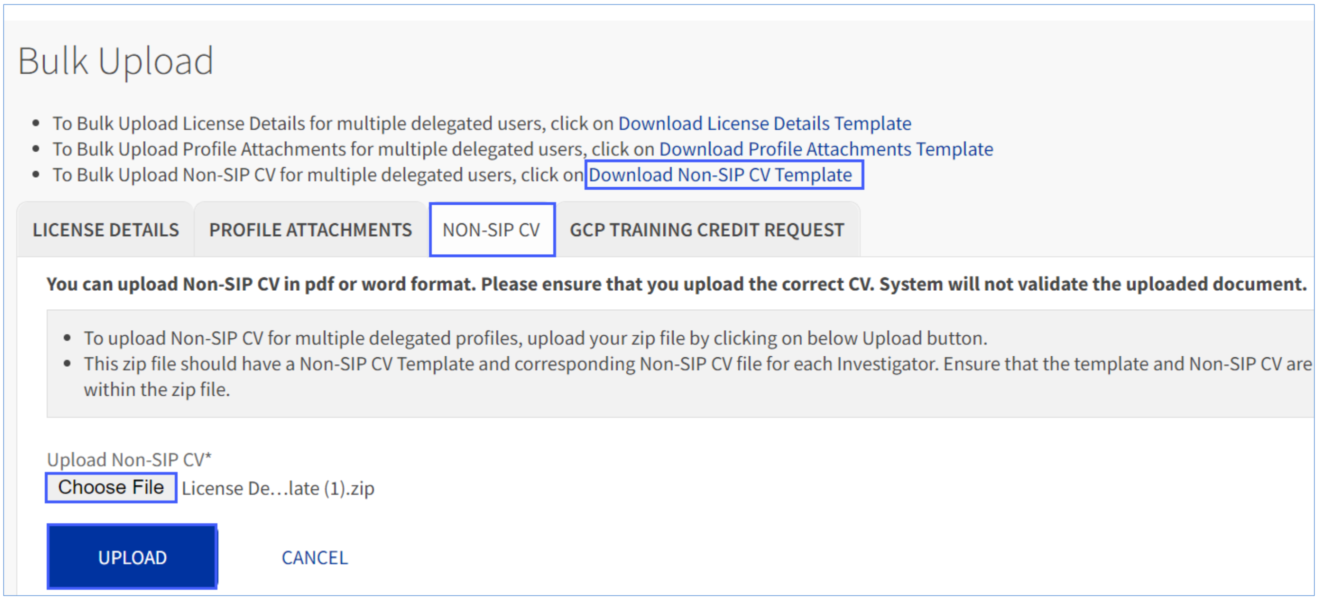
Delegates can bulk upload NON-SIP CV for multiple Investigators using the **NON-SIP CV Template**.

To Bulk Upload NON-SIP CV

1. On the menu bar, click **User Profile**, and then select **Delegated Profiles**. The **Delegated Profiles** page is displayed.



2. Click **Bulk Upload**. The **Bulk Upload page** appears. Select the **NON-SIP CV** tab.



3. Click **Download NON-SIP CV Template** to download the excel template for bulk uploading NON-SIP CV.

*1) Refer to the **Read Me** sheet in excel template for information on the mandatory fields and specific instructions on template upload.*

*2) The **First Name, Last Name** and **Email Address** details of all the profiles delegated to the site user are pre-populated in the Non-SIP CV template. Do not modify the pre-populated information otherwise it will give an error.*

*3) The file name of the Non-SIP CV (with extension) should be entered in **Document Name** column of excel template. This is case-sensitive so ensure that it is an exact match otherwise an error will be displayed.*

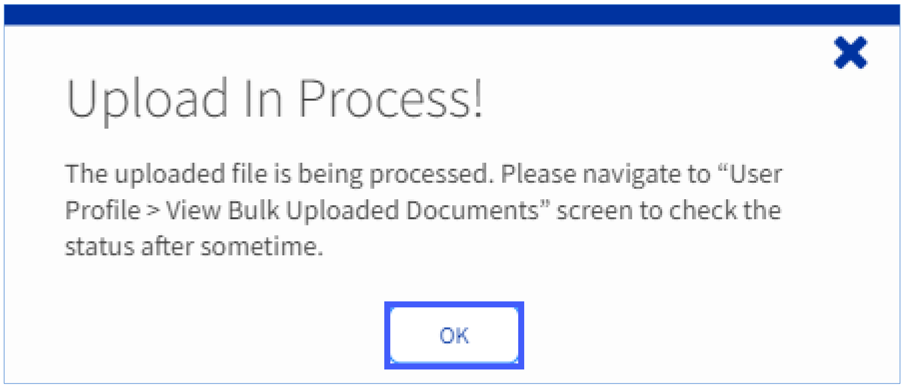
4) Multiple entries for the same site user are not allowed.

4. Once all details are filled in the template, zip the file containing **NON-SIP CV Template** and the corresponding Non-SIP CV for each Investigator. Non-SIP CV Template and CVs of the investigators should be in the same folder otherwise an error will be displayed.
5. Click **Choose File** to select the zip file that contains the excel template and the Non-SIP CVs of the Investigators.

1) The maximum file size allowed is 50 MB. If the file size limit is exceeded, error pop-up box appears.

2) If any other file other than a ZIP file is selected for upload, error pop-up box appears.

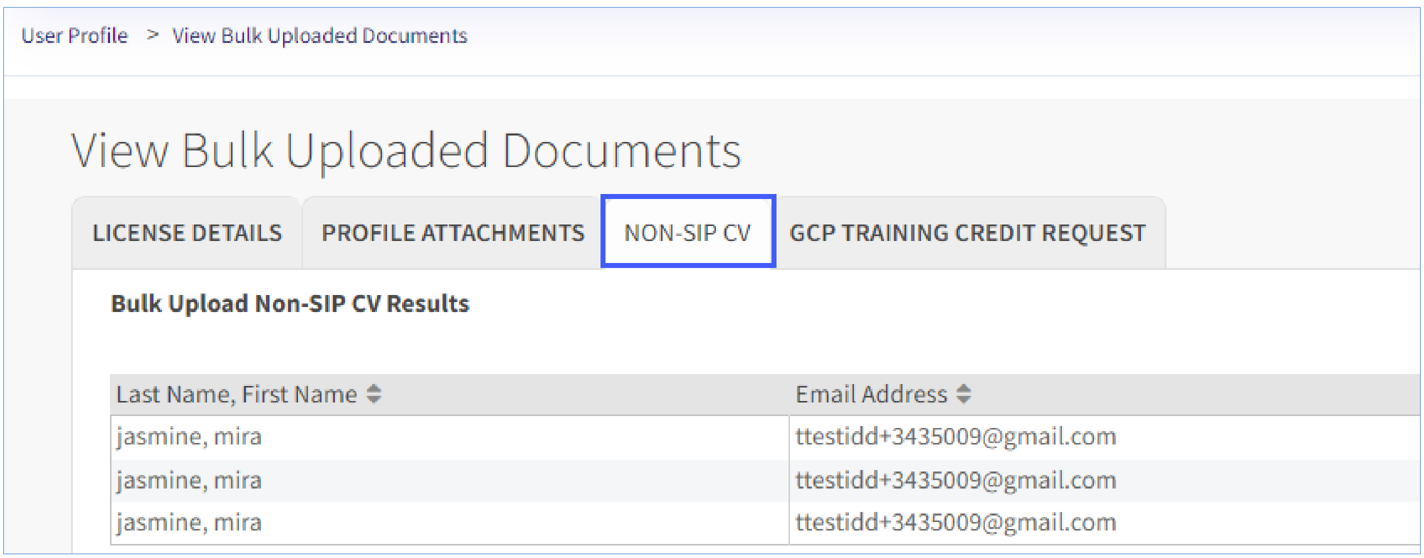
6. Click **Upload** after selecting the zip file. The following pop-up message appears.



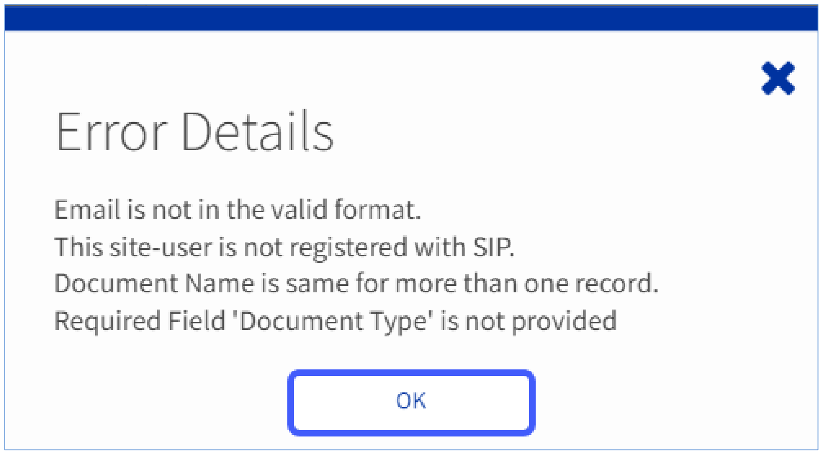
1) A notification is triggered to the Delegate once all the records in the zip file are successfully processed.

2) If a wrong NON-SIP CV Excel template is uploaded as part of the zip file, i.e, wrong column sequence, wrong fromat, or empty template, the upload process stops and an alert is sent to the Delegate.

7. To view the status of the uploaded documents, click **User Profile**, and then select **View Bulk Uploaded Documents**.



8. The following are the statuses available for the records being uploaded:
   - **Processing** - the documents are currently being processed for upload.
   - **Error** - an error has occurred when uploading the documents. Failed records are marked as error with a hyperlink in the **Uploaded Status** column of the **View Bulk Uploaded Documents** screen.
   - **Uploaded** - the document has been successfully uploaded. Respective updates will be visible in Delegator's User Profile section.
9. Clicking on the Error hyperlink displays all the errors associated with the record. The following screen appears.



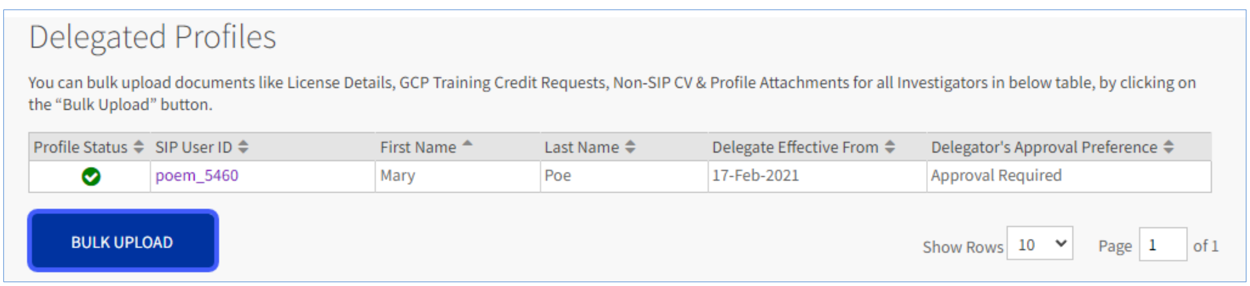
10. Click on **Export** to download all the bulk-uploaded NON-SIP CV records by the delegate in excel format. Users can also print all the records displayed in View Bulk Uploaded Documents screen using the **Print** option.

16.5 Bulk Upload Training Credit Request

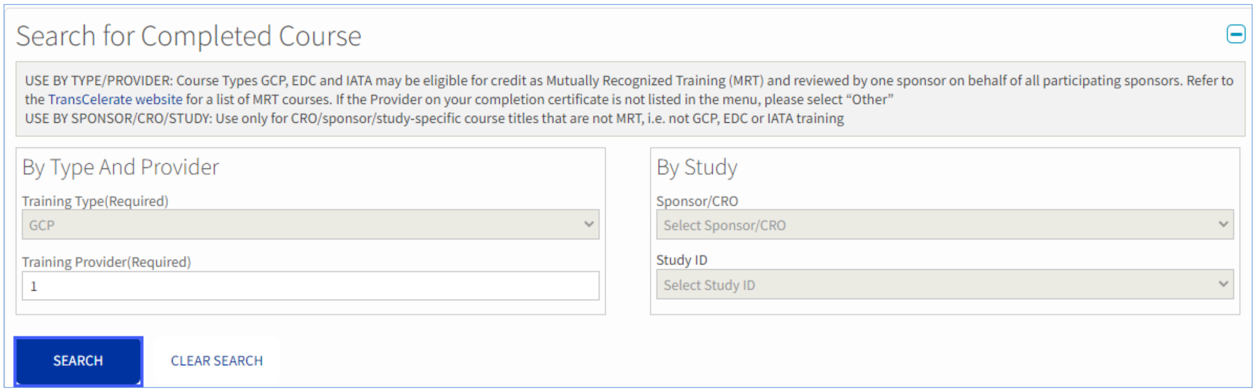
Delegates can bulk upload Training Credit Request for multiple Investigators using the **Training Credit Request Template**.

To Bulk Upload Training Credit Requests

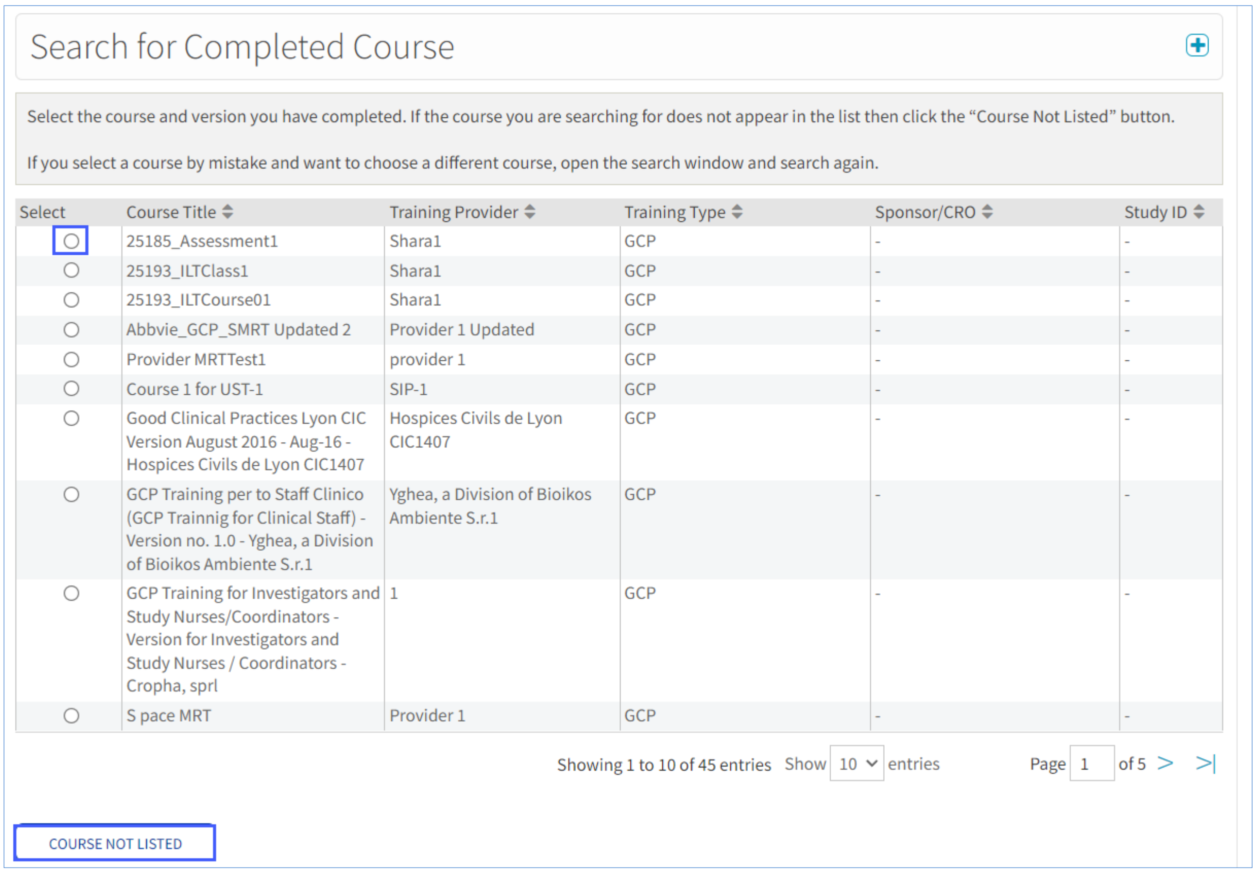
1. On the menu bar, click **User Profile**, and then select **Delegated Profiles**. The **Delegated Profiles** page is displayed.



2. Click **Bulk Upload**. The **Bulk Upload** page appears. Select the **Training Credit Request** tab. Select the **Training Provider** from the drop-down menu. Click **Search**.



3. The search results are displayed. Click the radio button to select the necessary course to upload the training credit requests.


Search for Completed Course

Select the course and version you have completed. If the course you are searching for does not appear in the list then click the "Course Not Listed" button.

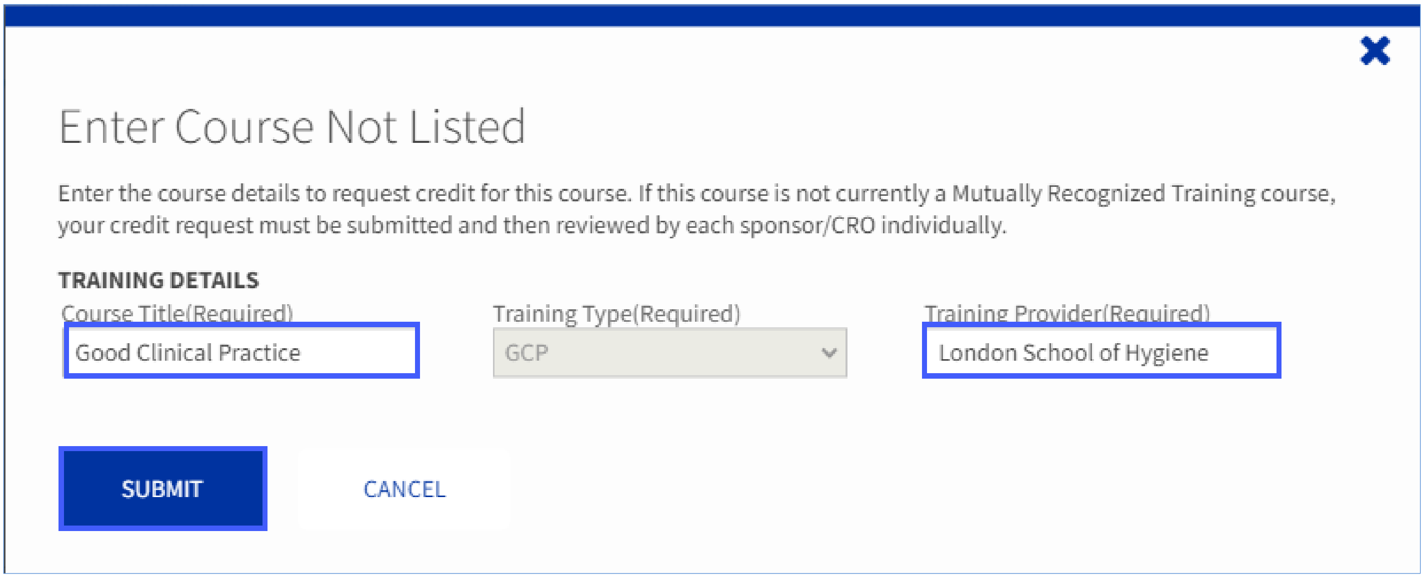
If you select a course by mistake and want to choose a different course, open the search window and search again.

Select	Course Title	Training Provider	Training Type	Sponsor/CRO	Study ID
○	25185_Assessment1	Shara1	GCP	-	-
○	25193_ILTClass1	Shara1	GCP	-	-
○	25193_ILTCourse01	Shara1	GCP	-	-
○	Abbvie_GCP_SMRT Updated 2	Provider 1 Updated	GCP	-	-
○	Provider MRTTest1	provider 1	GCP	-	-
○	Course 1 for UST-1	SIP-1	GCP	-	-
○	Good Clinical Practices Lyon CIC Version August 2016 - Aug-16 - Hospices Civils de Lyon CIC1407	Hospices Civils de Lyon CIC1407	GCP	-	-
○	GCP Training per to Staff Clinico (GCP Trainnig for Clinical Staff) - Version no. 1.0 - Yghea, a Division of Bioikos Ambiente S.r.1	Yghea, a Division of Bioikos Ambiente S.r.1	GCP	-	-
○	GCP Training for Investigators and Study Nurses/Coordinators - Version for Investigators and Study Nurses / Coordinators - Cropha, sprl	1	GCP	-	-
○	S pace MRT	Provider 1	GCP	-	-

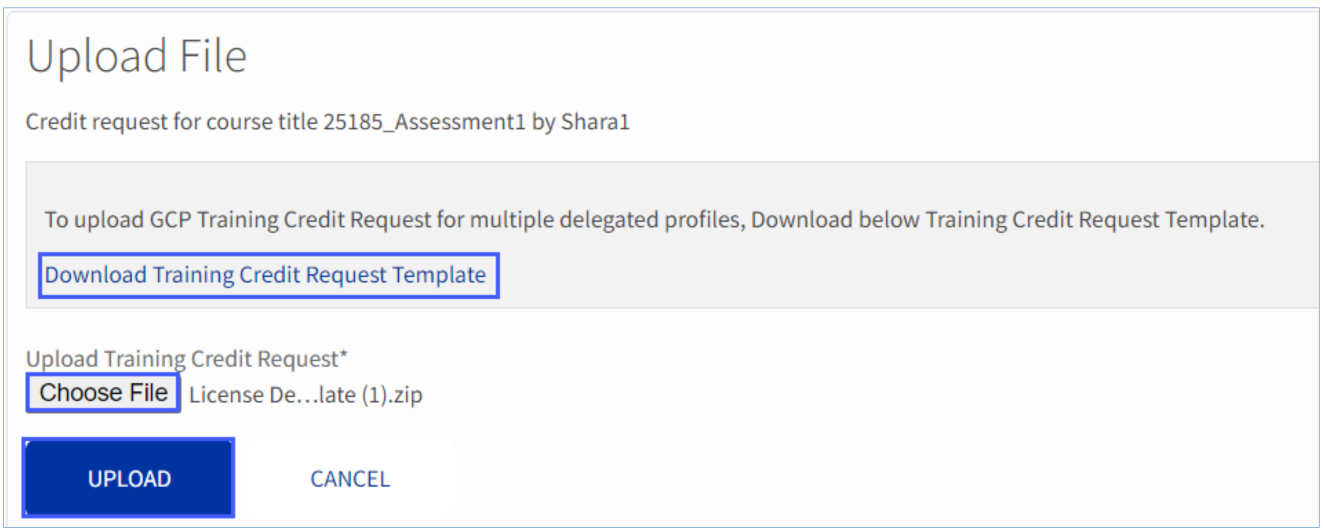
Showing 1 to 10 of 45 entries Show 10 entries Page 1 of 5

COURSE NOT LISTED

In case the course is not listed in SIP, click on **Course Not Listed** option to manually add your course details. This course will be treated as a Non-MRT course.



4. Click **Submit** to update the course details. The **Upload File** screen appears.
5. Click on the **Download Training Credit Request Template** hyperlink to download the template file.

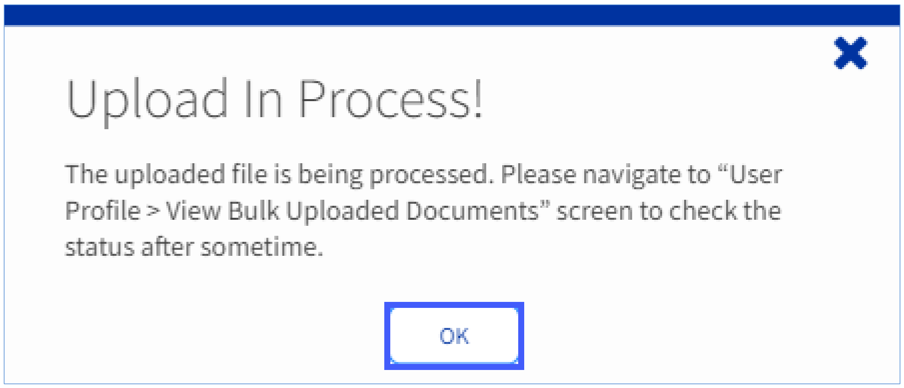


*1) Refer to the **Read Me** sheet in excel template for information on the mandatory fields and specific instructions on template upload..*
*2) The **First Name, Last Name** and **Email Address** details of all the profiles delegated to the site user are pre-populated in the **Training Credit Request Template**.*
*3) The course details selected in **Select a Completed Course** screen are also pre-populated in the **Training Credit Request Template**. Do not modify any of the pre-populated information in the template otherwise it will result in error.*
*4) The file name of the GCP certificate (with extension) should be entered in **Document Name** column of excel template. This is case-sensitive so ensure that it is an exact match otherwise an error will be displayed.*

6. Once all the details are filled in, zip the file containing the **Training Credit Request Template** and the corresponding **Training certificate** for each **Investigator**. Ensure that the template and certificate are present in the same folder within the ZIP file otherwise an error will be displayed.
7. Click **Choose File** to select the **ZIP** file containing the **Training Creadit Credit Request Template** and the supporting GCP completion certificates.

1) The maximum file size allowed is 50 MB. If the file size limit is exceeded, error pop-up box appears.
2) If any other file other than a ZIP file is selected for upload, error pop-up box appears.

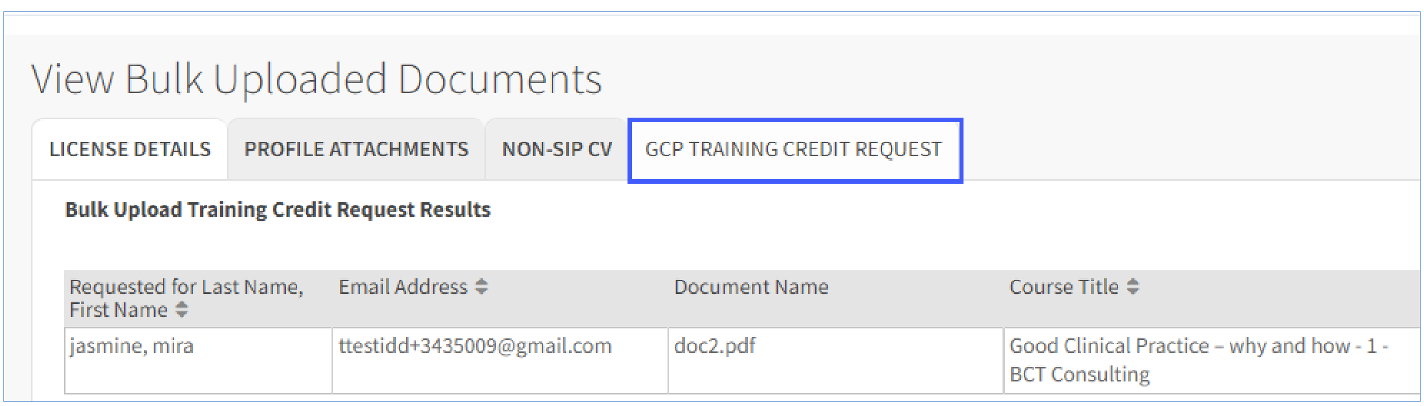
8. Click **Upload** after selecting the zip file. The following pop-up screen appears:



9. Click **OK**.

1) A notification is triggered to the Delegate once all the records in the zip file are successfully processed.
2) If a wrong Training Credit Request Excel template i.e, wrong column sequence, wrong fromat, or empty template, is uploaded as part of the zip file, the upload process stops and an alert is sent to the Delegate.

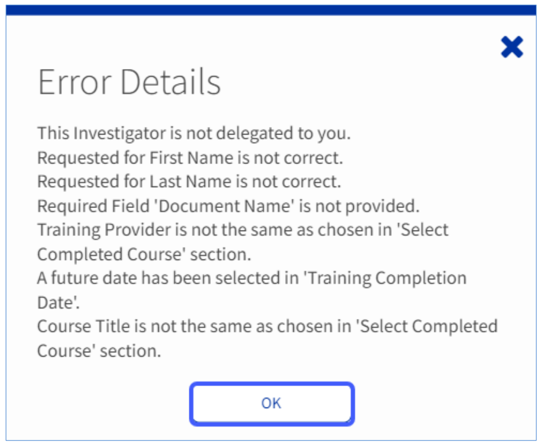
10. To view the status of the uploaded documents, click **User Profile**, and then select **View Bulk Uploaded Documents**.



11. The following are the statuses available for the records being uploaded:
    - **Processing** - the documents are currently being processed for upload.
    - **Error** - an error has occurred when uploading the documents. Failed records are marked as error with a hyperlink in the **Uploaded Status** column of the **View Bulk Uploaded Documents** screen.

- **Uploaded** - the document has been successfully uploaded. Respective updates will be visible in Delegator's User Profile section.

12. Clicking on the Error hyperlink displays all the errors associated with the record. The following screen appears.



13. Click on **Export** to download all the bulk-uploaded Training Credit Request records by the delegate in excel format. Users can also print all the records displayed in View Bulk Uploaded Documents screen using the **Print** option.