

Create a Protocol

1. From the Menu navigate to Payments > Protocols. The Protocols landing page opens, where you can see all protocols in the system.

2. Click New Protocol.

3. Enter your protocol's information:

- **Protocol Number (same as IRB Number)**
- **NCT Number (if applicable)**
- **Protocol Name**

4. Click Create. The new protocol record opens.

5. Enter Protocol Details:

- **IRB Number (optional)**
- **Financial/Internal Reference Numbers (WorkDay cost center/number)**
- **Keywords (enter PI Name)**
- **Business Units (Dept Name)**
- **Allow Reimbursements? (YES or NO)**
- **Status (make sure it's set to YES)**
- **Visit Schedule/Reimbursement Rules (if applicable)**

6. Enter Protocol Users. This is the staff that will be working in Advarra Payments for this study.

7. When finished, Click Save.