

Recruitment Materials Toolkit

Quick Reference

1 Fill out order form

The Recruitment Materials Toolkit contains free customizable templates for investigators and study staff. To use the templates and place a print order, go to <http://dmm.ucsf.edu/ctsi/>. You will need a UCSF Documents, Media, & Mail account, including fund and DPA codes. To log in, use an existing DMM account or click **Register New Account** to create one. Fill out the form as follows:

1. **Select Population** Click **Adult** or **Pediatric**.
2. **Select Collateral Type** Click **Brochure**, **Postcard**, or **Poster**.
3. **Select Design** Select a design from the color images displayed.
4. **Select Print Quantity** Select the number of copies from bulk quantities of 50 to 500. Printing prices are displayed.
5. **Enter study info** To customize the template, enter study-specific information into the form fields.

2 Review & submit proof

Text, design, and order information can be reviewed and changed on new and saved orders. To navigate the form, click **Back** or **Continue**. To proof text edits, refresh the **Text Preview**. To view a pdf of the whole layout, click **Review Proof**. Remember to save a copy of the final proof to a local drive, then click **Save & Hold Order**.

6. **Submit to CHR** *All final proofs must be submitted for CHR review.* If the proof is approved, log in to you account and open the saved order. Click “I have viewed the proof and approve it.” Check “I certify that these materials have been reviewed and approved by CHR.” (If stipulations are received, edit the saved order to make the appropriate changes and resubmit proof to the CHR.)
7. **Submit print order** Review the billing and shipping information. Click **Submit Order**.