A Review of the New Institutional Policy For Obtaining EPIC access for Research Monitors

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*Attention EMR Policy Change: The policy has been updated since this session was recorded and monitors are now asked to access the internet using “MUSC guest”, as opposed to the “MUSC secure” wireless network.
Why Develop a New Policy?

- No prior unified, written policy on the process
- Inconsistent processes across departments lead to training challenges
- Sponsor concerns with NetID request forms
- Security concerns with monitor EMR access rights
MUSC Personnel Process for Requesting Monitor Access

- Upon first notification that research monitor will be visiting campus, verify whether or not the monitor has a NetID
  - Will need to confirm if that NetID is active
    - If NetID is not active, will need to notify HR for the password to be reset

- If monitor has never obtained a NetID, MUSC personnel will have to request a NETID for the monitor
Requesting a NetID for a Research Monitor

- An MUSC research personnel assigned to the study being monitored, will sign the “External Research Monitor/Sponsor Auditor Agreement”, thereby sponsoring the external NetID request.
  
  Form has been updated-no longer includes social security number

- Submit “External Research Monitor/Sponsor Auditor Agreement” to University HR specialist (currently Courtney Cullum)
  
  Give HR as much notice as possible

- If NetID request is approved, MUSC research personnel is notified by HR and can pick up the monitor’s NetID at HR Office or on 4th floor of library
External Research Monitor/Sponsor Auditor Agreement

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Justification for Need: The above requester requires an MUSC non-employee NetID in order to monitor the study and data management for a research study being conducted at MUSC.

1. Research Monitor acknowledges that MUSC paper files and electronic medical record systems contain protected health information for all of its patients. Research Monitor agrees to only access the information deemed necessary by Research Monitor in those medical records of patients who are patients participating in an authorized study (“Study”) in which MUSC participates. The study coordinator will place records of identified Study participants in a queue for access by the Research Monitor. Study Monitor may not access information of patients other than those included in the above referenced Study.

2. Information contained in the MUSC record may not be disclosed as set forth in the Clinical Trials Agreement pertaining to the applicable study.

3. Research Monitor acknowledges and agrees that he/she will comply with the requirements of MUSC Policy C-03, which is incorporated herein by reference.

4. If, in connection with this Study, the Research Monitor comes into contact with individually identifiable health information relating to patients who are not Study patients or information of Study patients deemed by authorized Sponsor and Research Monitor as not necessary for the Study, Research Monitor will maintain the confidentiality of such information and not knowingly use it for any purpose. Research Monitor will also alert the MUSC Study Coordinator associated with the Study.

5. Research Monitor acknowledges that MUSC may audit access to and use of patient information by Research Monitor at any time or on an ongoing basis.

6. Research Monitor understands that the log on ID and computer password (Credentials) assigned to Research Monitor are to be used solely by Research Monitor in connection with the Study and sharing the Credentials is prohibited. Research Monitor understands that the access is temporary for the limited time of the review.

7. Research Monitor may not share or misuse assigned Credentials. Sharing or misuse of Credentials may result in termination of access to all Study patient information by Research Monitor. Research Monitor further understands that violation of this External Research Monitor/Sponsor Auditor Agreement (“Agreement”) may result in Research Monitor being barred from accessing MUSC information and prosecution to the fullest extent of state or federal law.

8. If a Research Monitor permanently stops working on the Study for any reason or no longer needs access to Study information, then Research Monitor shall have the Sponsor immediately report this to the Principal Investigator.

I understand that the Medical University of South Carolina reserves the right to accept or reject my application for Credentials in its sole discretion.

I release the Medical University of South Carolina for any and all damages I may incur as a result of this Agreement.

I hereby certify that the above statements made in this application are true and accurate. I further agree to indemnify and hold harmless MUSC and its affiliates for any and all claims which may arise as a result of this Agreement.

Signature: ______________________ Date: __________

The information below is to be completed by MUSC Research Personnel:

- MUSC Sponsor’s Name
- MUSC Sponsor is the research team member responsible for endorsing the Net ID
- MUSC Sponsor Phone Number
- MUSC Sponsor Email
- MUSC Sponsor Department Name/Phone Number

The External Research Monitor named above is a representative of an external company or organization that is currently under contract with MUSC or with a Sponsor of a study in which MUSC participates. I agree to oversee Study Monitor’s access to the medical records of Study Participant’s in accordance with the above agreement.

MUSC Sponsor’s Signature: ______________________ Date: __________
Notifying/Instructing the Monitor of Action Items

- Upon receiving the NetID and temporary password, the MUSC research personnel will send this information, as well as instructions on how to change the temporary password and how to request EPIC access to the research monitor (prior to their arrival on campus).
  
  An email template has been drafted for this purpose.
Included below is your NetID and temporary password required to access our institution’s Electronic Medical Record (EMR). Please complete the following steps as soon as possible to ensure that your access is activated prior to arrival on site.

1) You are required to change your temporary password to a personal password. To do so, please visit netid.musc.edu and click on “Change password”. You will be prompted to read the MUSC Computer Use Policy and indicate agreement by clicking the check-box at the bottom and entering your NetID. On the next screen, you will be asked to enter your temporary or “Current Password” and create and confirm a “New Password”.

2) Once you have changed your password, you can request access to EPIC (the EMA system) at https://www.musc.edu/medcenter/epic/webaccount/form.html. Enter your “First Name” and “Last Name”. For the field titled “Role” please select “Other” and subsequently in the “Role (if not in dropdown above)” please type “Research Monitor”.

3) You will be notified by the EPIC security team when your account has been created.

4) When you arrive on campus, to access EPIC you will have to first join the “MUSC secure” wireless network. You will need to log-in to the network with your NetID and password.

5) Once you have joined the “MUSC secure” wireless network, access WebApps at https://webapps.musc.edu/vpn/index.html.

6) Click the “EPIC” icon on the WebApps dashboard to access the EMR.

Net ID:

Temporary Password:
Additional Changes to the External NetID request process

- Monitor no longer needs to sign C-027
- Monitor no longer needs to sign confidentiality agreement
- The request form has been changed and contract wording updated to cover the language that was originally included in these additional documents
Benefits of the New EPIC restricted access template

- Monitors can no longer view patients that are not on their study
- Monitors have no capabilities to add/edit anything in EPIC

*Please note: University Compliance will still be performing HIPAA audit checks for MUSC research personnel to review and sign off on when a monitor has completed their visit

University compliance must be notified EVERY time a monitor visit in scheduled

*Email Angel Orechovesky and copy Cindy Teeter*
Creating Patient Lists in EPIC

- Study coordinator logs into their EPIC account and creates list of patients that the monitor will need to review during their visit
  The creation/editing of this list takes place in real time, so if patients needed to be added during the visit this will not be a problem
- Study coordinator grants access of this list to the monitor (by NetID)
  *Must grant VIEW-ONLY access of the list*
- *EPIC demo of creating/sharing patient lists*
When Monitors Arrive On Campus...

- Have them log-on to “MUSC secure” wireless network using their own NetID and password
- Have them access EPIC through WebApps at https://webapps.musc.edu
- Provide them with View-Only Restricted Access template training
View-Only Restricted Access EPIC Template Training for External Users

Step 1: Login to Epic using your NetID and Password.

Step 2: Your Epic login department is “Medical Records.” If a drop-down menu appears in the department field, click on the magnifying glass to open up a department search box where you can select “Medical Records.”

Step 3: Your screen will automatically open to patient lists where you can view only the patients that have been shared with you by the study team. If there are any patients you wish to see that have not been provided in the list please contact your study coordinator. To view a patient double click on their name.

Step 4: The patient’s chart will open and you will have access to the Patient Summary as well as the Chart Review activity.

Patient Summary:
Additional Notes and Future Plans

- Currently this process is for on-site visits only. As of now, there is no approved process for remote monitoring.
  This process does have the potential to be applied for remote monitoring capabilities but not until additional procedures/securities are in place.

- Access policy and forms at the MUSC University HR page.

- Contact the SUCCESS center with any general questions/comments about the policy or related documents (success@musc.edu, 843-792-8300)
  If your question is related to one specific step/department listed in the policy, please contact that department directly.