

## STEPS COMMONLY REQUIRED TO OBTAIN EMR ACCESS FOR MONITORS

- 1) The Primary Study Coordinator or departmental sponsor contacts their IT to initiate the process to obtain login credentials for the monitor.
- 2) Confidentiality Agreement of Privacy Practices and HIPAA training statements are signed by the Monitor
- 3) Monitor must provide information including contact, title or function, DOB, last four of SS# and a background check may also be performed.
- 4) IT issues a username and password to the monitor
- 5) Site specific training which may include use of the EHR, Human Subjects Protection, HIPAA privacy policies may be required.
- 6) The Sponsor submits a Request for Access providing departmental information, name of grantee, reason for access, IRB # of study to be monitored and length of time for access.
- 7) Once approved, the Primary Study Coordinator provides IT with the medical record number(s) of the research subject to be reviewed
- 8) Depending on the EHR system, the study subject's record may be placed in a drop box or basket to be available for review during a specified time period, which may be limited.