ACCOUNTING OF DISCLOSURE SYSTEM INSTRUCTIONS

To use the Accounting of Disclosure System (ADS) you have to be a “user” in the system. To be assigned/enroll, call the Integrity Office # 4-8849 or email acctdisc@ohsu.edu

Use this link: https://o2.ohsu.edu/custom/integrity/accounting-of-disclosures/

or

Click the icon on the Integrity Department Web page: https://o2.ohsu.edu/integrity-department/index.cfm
This is the display page: search for the patient using mrn, ssn, irb number, last name etc.; or, move to the next screen:

If **Research**, this is the entry for research involving > 50 patients:
Second screen for >50 patients search:

If we do not have a research study with the IRB number you entered, please add your study here. Please note that a research disclosure is only relevant for a study with greater than 50 subjects. If your research study will have fewer than 50 subjects, you should complete a disclosure for each individual subject using the patient disclosure form.

For research involving 50+ individuals, record the start date and anticipated stop date/or length of the study; a description, in plain language, of the protocol or other research activity, including the purpose of the research and the criteria for selecting particular records, 45 CFR 164.528(b)(4).
Add recipient and sponsor:
Or for research involving less than 50 disclosures use New Patient Disclosure screen:

**New Patient Disclosure**

To add a new patient disclosure, please find the patient by using either the OHSU Medical Record Number or the patient SSN in the form fields below. If you do not have either available, you can search by additional demographics below.

**OHSU MEDICAL RECORD NUMBER**

- ex 00000000 (up to 8 digits)

**PATIENT SSN**

- ex 000-00-0000

**ADVANCED SEARCH**

- **PATIENT FIRST NAME**
  - Enter First Name

- **PATIENT LAST NAME**
  - Patient Last Name

- **PATIENT DATE OF BIRTH**
  - MM/DD/YYYY

- [Search Patients]

If a patient match is not found, you will have the opportunity to add a new patient record. Fill out with current information and then Save Patient and Continue:
Note the list for “Type of Disclosure” includes “Research Records”. Hold down CTRL to select multiple items”. Select “Purpose of Disclosure” and select “Research Study”. Enter the IRB Number.

Select PHI Owner (the list can be expanded to include research that is multiple sites with an owner that is outside of OHSU). This is important particularly if OHSU is a Business Associate of another institution for any purpose including research (data analysis for example):
Add “Notes”. For research involving 50+ individuals, record the start date and anticipated stop date/or length of the study; a description, in plain language, of the protocol or other research activity, including the purpose of the research and the criteria for selecting particular records, 45 CFR 164.528(b)(4).